ektron CMS400.net

CMS400.NET Administrator Training Manual and Exercises

CMS400.NET Version 8.0.2

ektron

What do you want your website to do?

CMS400.NET Administrator Training Manual and Exercises

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CMS400.NET

Version 8.0.2

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DAY 1 OBJECTIVES

Ektron Overview and CMS basics

- Basics of a CMS400.NET web site
- Roles of a CMS web site development project

CMS400 Administration

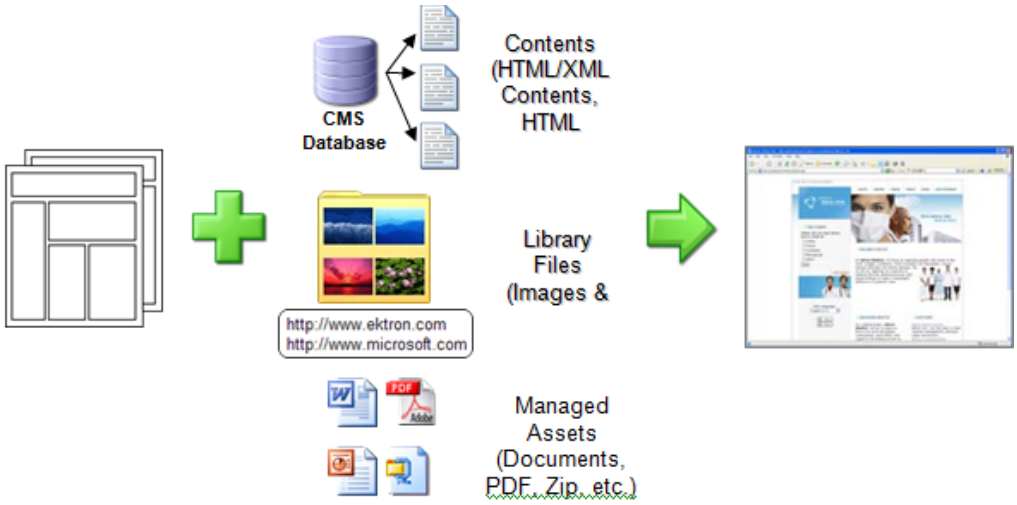
- How web pages are created by the developer and how the administrator interfaces with these pages.
- System Administration, Information Architecture and other General Administration areas.

Content, Folders and Workarea

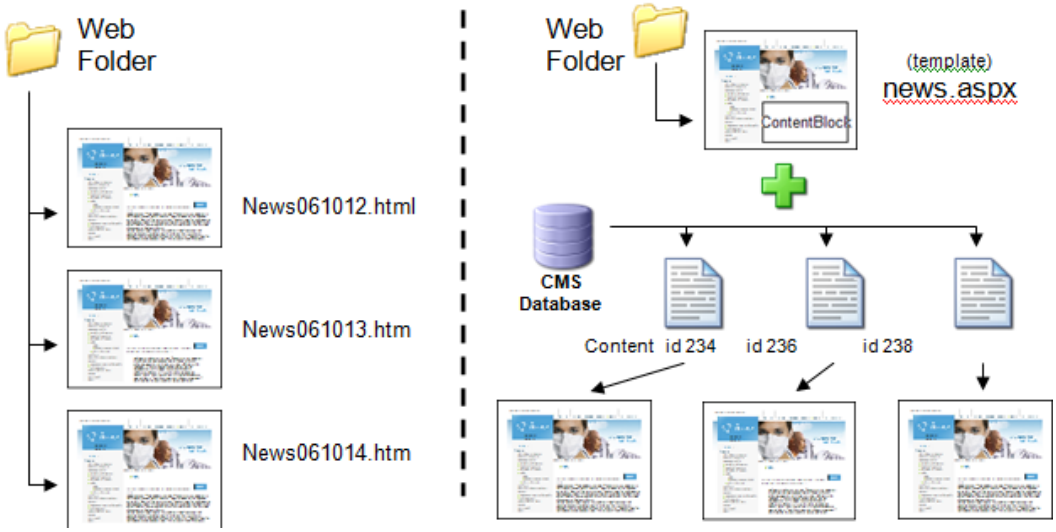
- Understanding the Ektron CMS400.net Workarea.
- Creating, Editing, and Managing Content.
- The Task system.
- Creating XML Content with Smart Forms

Unit 1 – Basics of a CMS400.NET Web Site

CMS400.NET Page Structure



Static vs. Dynamic Web Pages



Sample Template

A Poll object displays a poll (or results) which has been created in the Workarea
A Collection object retrieves selected content from a container created in the Workarea. This one is set to randomly display one of several images each time the page is refreshed.
A series of DhtmMenu objects point to menus created in the Workarea
A ContentBlock object retrieves a single piece of content.
A ListSummary object points to a folder and retrieves a list of content

Templates

- The CMS site will consist of a series of templates.
- A template contains server controls or other code that retrieves content from the CMS and displays it.
- A template holds a variety of servercontrols and code to perform a particular function.
- Templates are associated with content folders.
- When content is created, a Quicklink is added to the library.
  This link uses the assigned template and a Query String variable that instructs the template what content to load.

Types of Content

- Web Content
  - HTML (XHTML)
  - XML
- Managed Content
  - Office documents
  - .PDF files
  - Images
  - Multimedia files

Terms

- CMS - Content Management System for Web site content.
- Web site - a collection of pages which contain content & links to other pages.

- Static web pages have content hard-coded inside physical files (which are difficult to create & update).
- Dynamic web pages – With the use of a template, many web pages can be created dynamically rather than requiring that each individual page have it's own html file on the web server.
- Template - a container of content objects. Also an .aspx page.
- Server control – An object placed into a template that performs basic CMS functions. (e.g. – ListSummary, ContentBlock. Menu.)

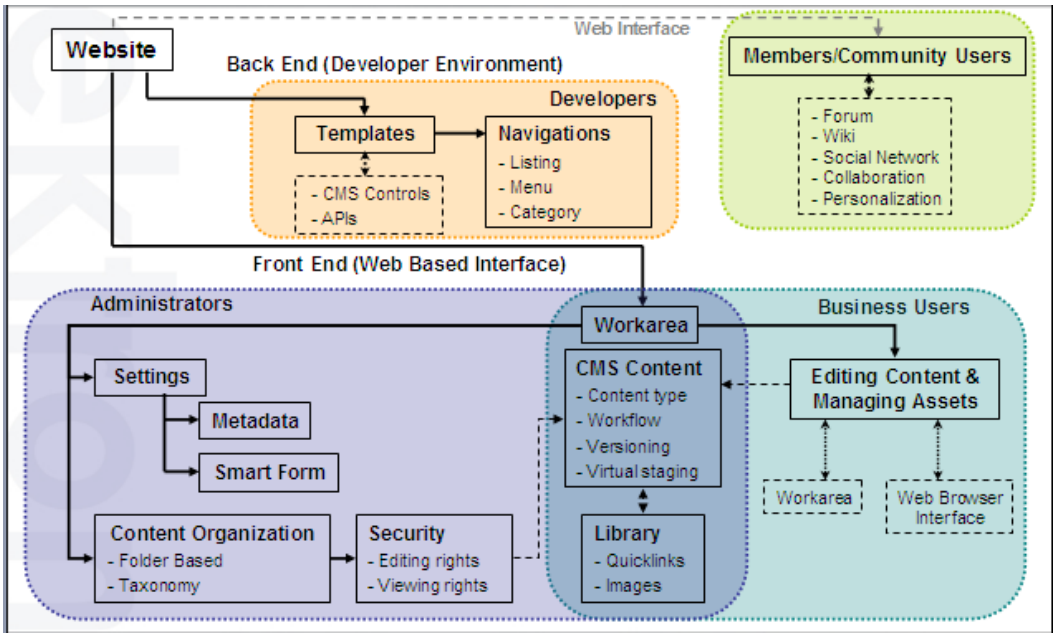
General Roles

CMS Application Administrators

- Works with web designers and developers to define the information architecture, site structure and implementation
- Manage CMS Users, User Groups, and Roles
- Manage Membership Users, User Groups
- Manage folder structures, permissions, and approval processes
- Uses CMS features to create Metadata, XML Configurations, Menus, Collections, Calendars, Web Alerts, URLs Aliasing, etc.

CMS Content Authors & Publishers

- Add and edit content in the CMS
- Upload and manage documents, images, & other files



Unit 2 – General Administration

System Architecture

Installing CMS400.net

- The CMS400.net installer creates an install base to be used by the Site Setup utility.
- Files include the documentation, the software and files for demo & minimum sites.
- Installing or upgrading the CMS install base does not affect existing sites until the Site Setup utility is run.

The Site Setup Utility

- Creates a web site that is managed by CMS400.net
- Creates several types of site such as CMS400min, Starter sites, Intranet sites, etc.
- Creates an asset library/catalog, a web.config file and the required database.
- Upgrades web sites and database files.

License Keys

- A license key is unique for each URL to a CMS400 web site.
- License keys are assigned to Production, Staging and/or development servers.
- Multiple license keys should be separated with a comma when entered.

Catalog & Database Names

- The Site Setup utility has default names for the asset catalog, asset directories and database. You may customize these during the site setup process.

Security Considerations before a site is “live”

- CMS400 sites are installed with three users: “admin”, “builtin” & “jedit”. Change these passwords before the site goes live.
- CMS400min sites contain a login template named “cmslogin.aspx”. The name of the template should be changed before the site goes live.

Error Logging

- CMS400.net logs errors in the Windows event log.
- This provides the ability to track any errors that might occur on your site.
- In addition, this error information can help the Ektron support team diagnose and fix errors.

Developing on a Local Machine

- In most cases, it is best to install the CMS Web site into the root directory of an IIS site.
- On Windows XP Pro, only one Web site is allowed. Windows 2000 Server, Windows Server 2003, Vista and Windows 7 allow multiple Web sites to be created.
- If possible, place each Web site in its own directory and change the home directory of the default Web site as needed.

Site Diagnostics

- You can open the site diagnostics page by going to: http://www.mydomain.com/workarea/diagnostics/status.aspx
- The diagnostics page contains information like version, license, settings, database, etc.

Information Architecture

Information Architecture is the practice of planning what information a site contains, its structure, and how users will navigate to it.

- Documenting the content inventory and navigation scheme will assist in implementing the information architecture.
- A good information architecture will take into consideration both site visitors and content authors.

Content Inventory

- The content inventory is a list of the content that will be on your site.
- It will not be an exact list of every individual piece of content, but rather it defines the types of content that will be on the site and describes their structure.
- With the CMS, your content inventory would also define which content is HTML and which uses XML/Smart Forms.

Folder Structure

- When planning your folder structure, consider both your content authors and the site's technical requirements (folder properties).
- One technique that can be used is a 3 tier structure.

1. Departments or job roles
2. Content type
3. Categories specific to a content type.

Taxonomy

- Taxonomy provides some very useful tools for organization across the folder structure.
- Taxonomy is an easy way to organize and display Web site content according to your categories.

Organizing with Metadata

- Metadata selectors provide the ability to create direct relationships between content items.
- Metadata searchable properties provide the ability to create indirect relationships between content items, making them searchable via keywords or attributes.

Using Smart Forms

- Fields within a smart form should contain data that applies specifically to the content.
- Data that relates to other items should use metadata.
    - Example: contact information fields like title, phone & e-mail would be smart form fields.
    - Department or Manager would likely be done with metadata.

Content and Site Analytics

By analyzing the user traffic coming to and interacting with your site, you can better understand key elements of your Web presence. Traditional Web analytics packages help you understand where your traffic is coming from, when the traffic is occurring (including high and low points) and what pages users are interacting with. But this information is often isolated from the Web content and is, therefore, lacking the context needed to take advantage of it.

Ektron CMS400.NET has a fully-developed, Web traffic analytics provider model. By hooking into best-of-breed analytics software, like Google Analytics, your Web site's information is integrated into CMS400.NET's Workarea and so is at your fingertips as you use it to optimize the site experience.

Analytics can help you

- determine the popularity of areas of your site
- examine click-through rates on your calls to action
- analyze site structure and navigation
- obtain key information about your site visitors

This information is essential to optimizing your site's content. Its seamless integration into CMS400.NET lets you fully leverage the data.

Using Analytics Data within Ektron CMS400.NET

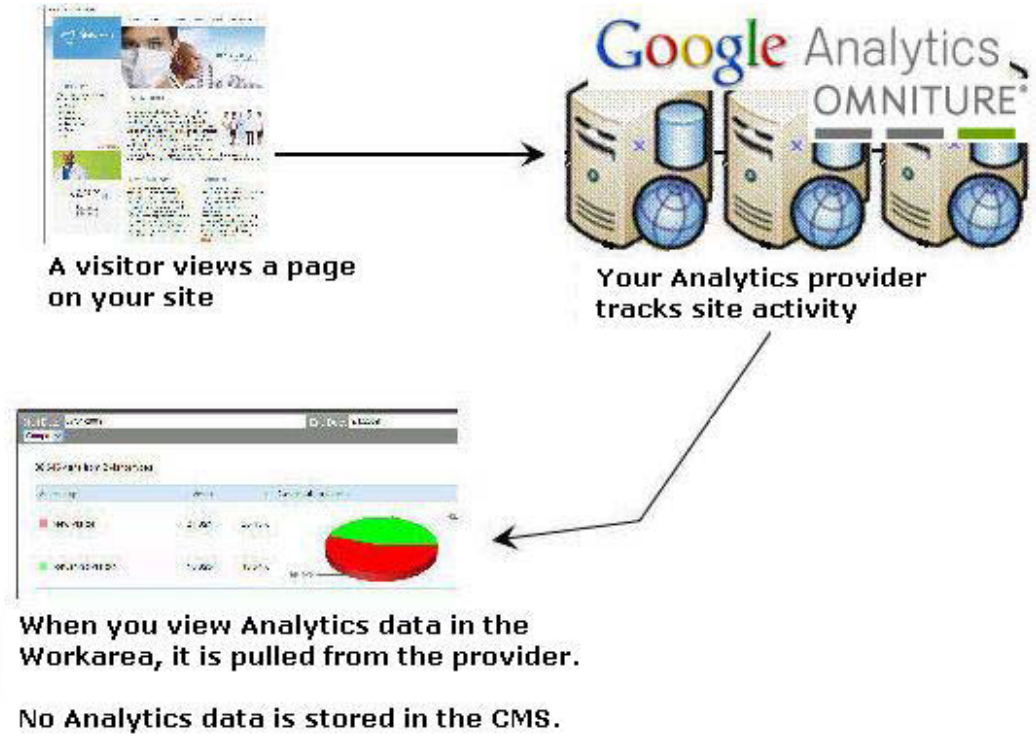
Ektron CMS400.NET's Workarea provides customized reporting, reflecting exactly the information you care about. The data can be broken down in many ways, such as

- number of visits per day
- browser usage
- visitor location
- visitor language

- top content
- referring sites

Google Analytics Provider

Google Analytics is an enterprise-class, Web Analytics solution that gives you rich insights into your Web site traffic and marketing effectiveness. Powerful, flexible and easy-to-use features let you see and analyze your traffic data in an entirely new way. With Google Analytics, you're more prepared to write better-targeted ads, strengthen your marketing initiatives, and create higher converting Web sites.


Google Analytics
OMNITURE
A visitor views a page on your site
Your Analytics provider tracks site activity
When you view Analytics data in the Workarea, it is pulled from the provider.
No Analytics data is stored in the CMS.

As shown above, once you set up Analytics tracking, the Analytics Provider monitors every site visit. In the Workarea, you can view this data from many angles.

Important: No provider Analytics data is stored in Ektron CMS400.NET -- the CMS retrieves it upon demand from your Analytics provider.

Its main features are:

- Advertising ROI - Measure the success of your display, search, new media and offline advertising efforts.
- Cross Channel and Multimedia Tracking - Compare your site usage metrics with industry averages and track Flash, video, and social networking sites and applications.
- Visualizing Data - Uncover trends, patterns, and key comparisons with funnel visualization, motion charts, mapping, and more.
- Customized Reporting - Create the reports, dashboards, and segments that make the most sense for your business.

- Sharing and Communicating - Administration controls and email reports allow you to share data across your organization.
- Google Integration and Reliability - Google Analytics complements a suite of related products, all running on the same world renowned infrastructure that powers Google.

Unit 3 – The Workarea

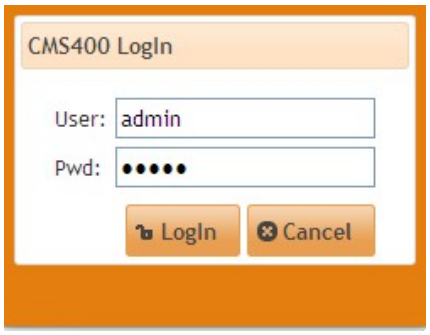
Reference: "The Workarea and Smart Desktop" chapter in *Ektron CMS400.NET Reference Manual.*

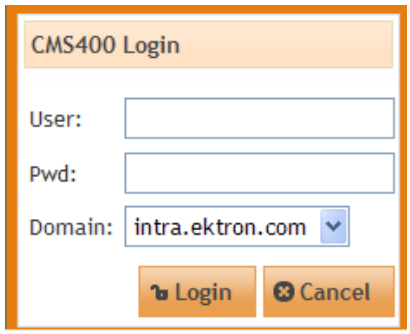
Logging into the CMS Workarea

1. Go to the login page supplied by your CMS administrator. (The default location is http://your_site_name/CMSlogin.aspx.) (Previous to version 7.6, the default login page was login.aspx.) You will see a **Login** button.

2. Click the **Login** button.
3. Enter your User Name and Password in the pop-up box.
   Default Username: **admin** and password: **admin**

   (If your site uses Active Directory, your login page will look like the image on the right. You will need to login to the proper domain.)





4. Now you see the buttons for **Logout**, **Workarea**, **Preview**, and **Help**:

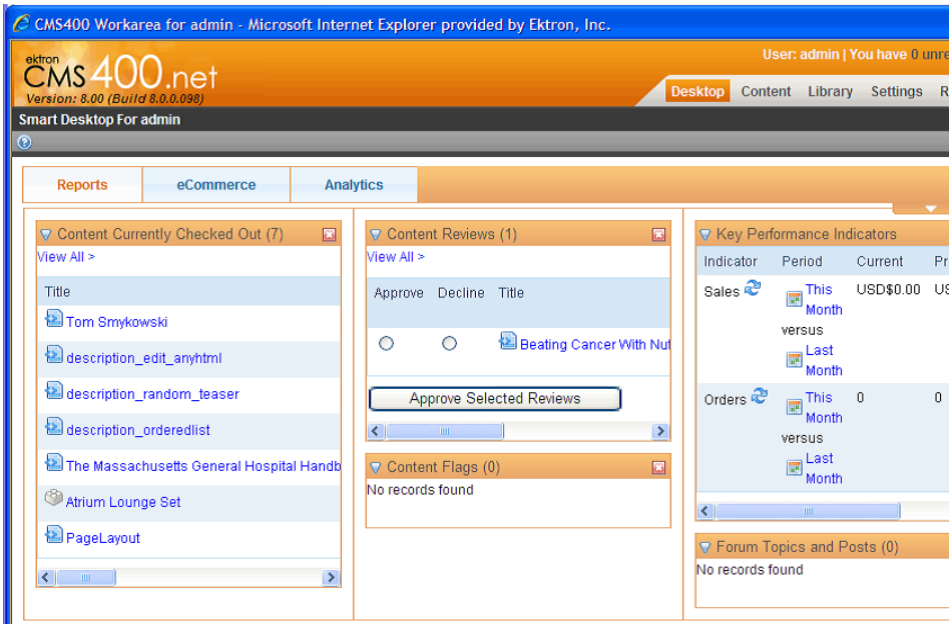
5. Click the **Workarea** button to enter the CMS Workarea.

Smart Desktop

By personalizing your Smart Desktop, you can choose and rearrange items displayed on the desktop that pertain to your work. To see the Smart Desktop, click the Desktop menu tab (

) in the Workarea's upper right corner.

The Smart Desktop looks like this.

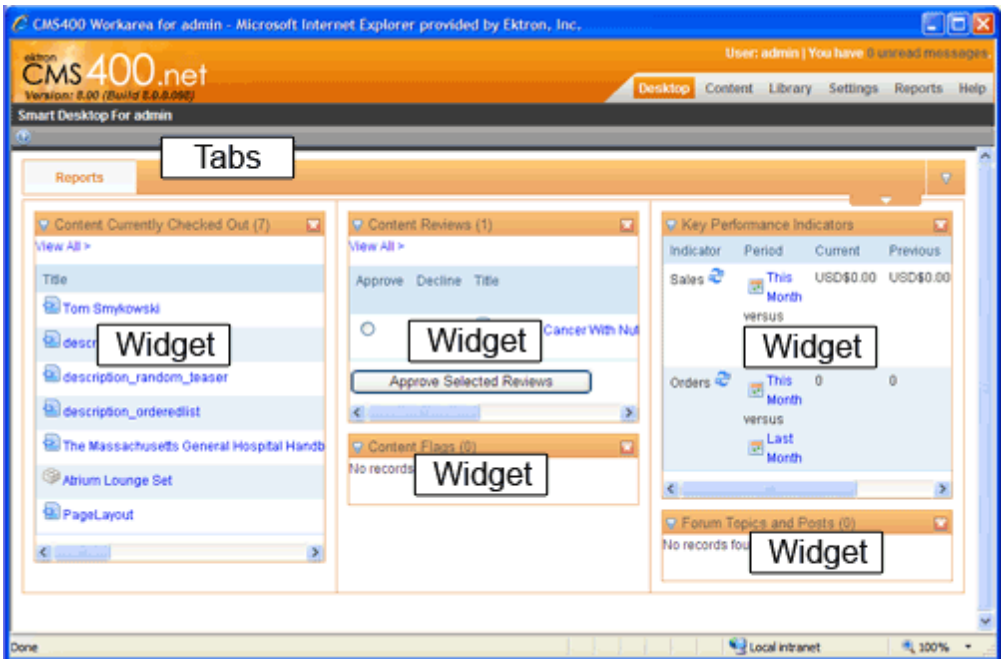


The default Smart Desktop page contains Widgets that provide information about your website. The page above shows the default widgets for the Ektron Medical starter site.

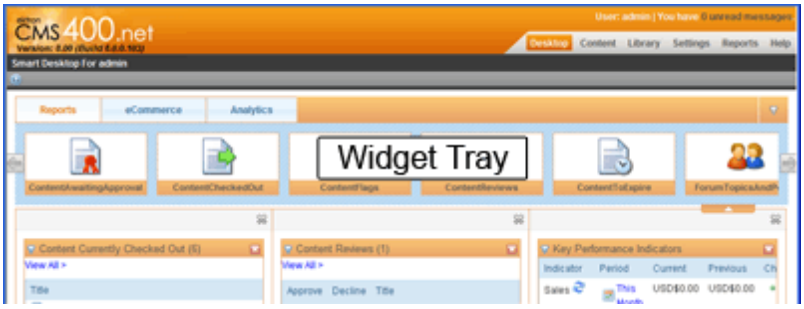
How to Personalize the Smart Desktop

Reference: "Personalizing the Smart Desktop" section of "The Workarea and Smart Desktop" chapter in *Ektron CMS400.NET Reference Manual.*

The Ektron CMS400.NET Workarea can have multiple tabs, letting you organize content by subject – think of tabbed browsing. You can easily add new tabs and switch between them. Within a tab, you can add, move or delete Widgets for your own personalized Smart Desktop.



Widgets that you use on the Smart Desktop are stored in a widget tray. You can drag and drop widgets from the tray onto the Smart Desktop into any tab and column.

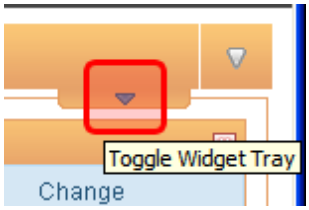


You control the arrangement of the Smart Desktop Widgets for your own profile.

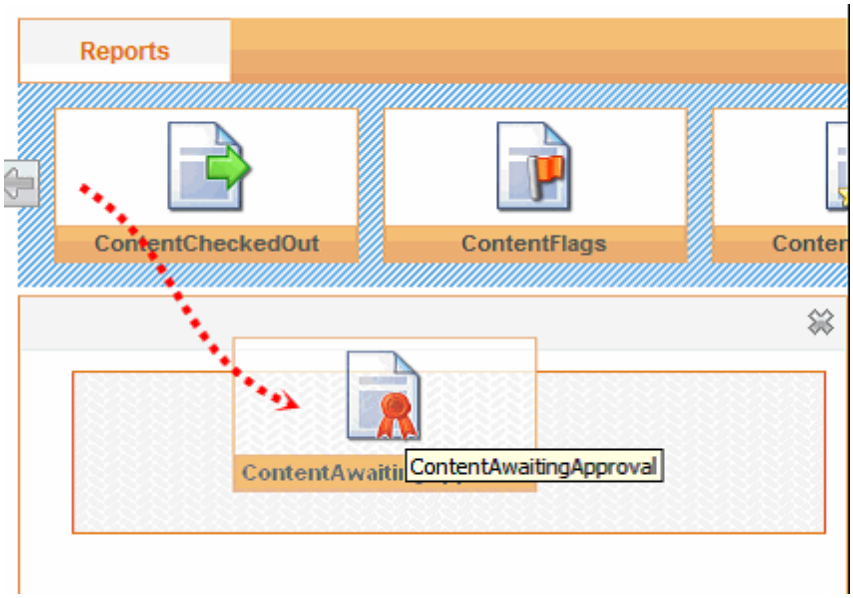
Adding a Widget into the Smart Desktop

Go to the **Workarea > Desktop** and follow these steps

1. Click **Toggle Widget Tray** located in the upper right corner of the Smart Desktop window (circled below).



2. Next you see the Widget Tray containing widgets that you can drag and drop onto your Smart Desktop. Use the left arrow or right arrow buttons to see more widgets.
3. Choose the widget you wish to use by dragging and dropping it from the tray into the Smart Desktop panel.
4.



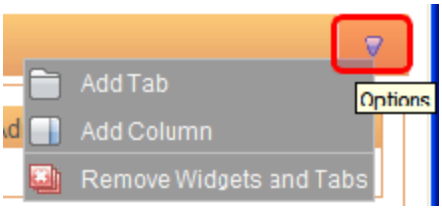
Once you have placed the widget into the Smart Desktop, you may drag it to any location on the desktop.

Adding a Tab to the Smart Desktop

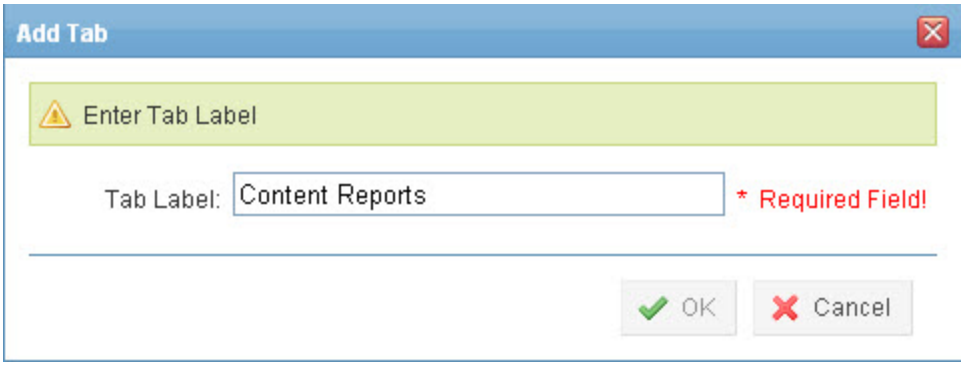
Tabs help you organize your Smart Desktop. By default, there is one tab containing a few standard widgets. You may wish to add other tabs for eCommerce or Analytics type widgets.

To add an eCommerce widget for example, do the following

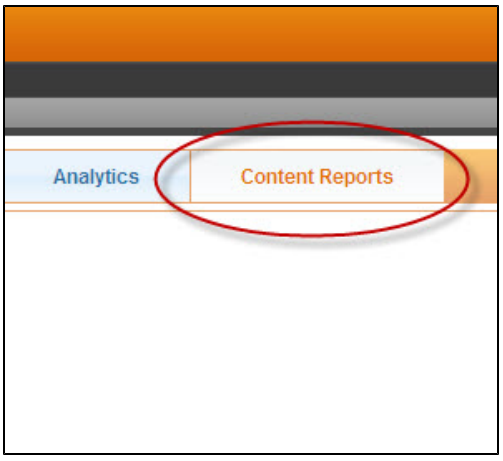
1. Click the **Options** button on the upper right of the Smart Desktop.



2. Click **Add Tab**. You see the Add Tab dialog window.



3. Enter "Content Reports" for the Tab Label.



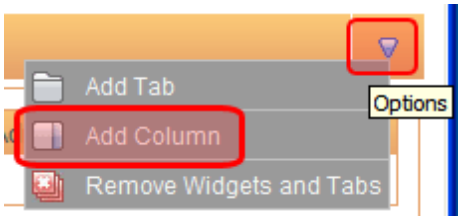
4. Click **OK** to save the Tab Label.

The new tab appears on the top of the Smart Desktop.

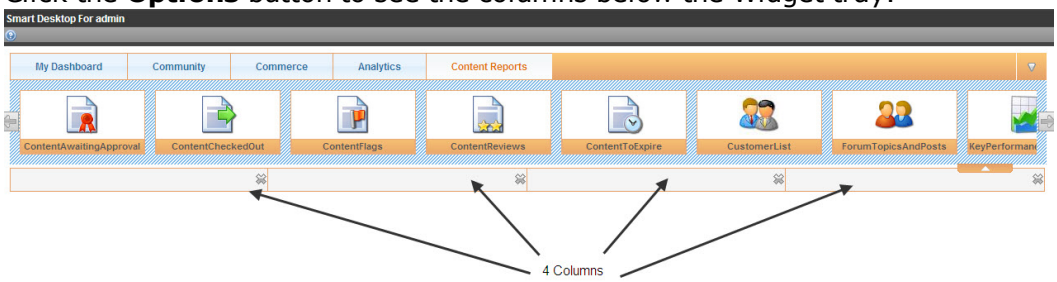
Adding Columns

By default, 3 columns are placed on the Smart Desktop. You may add columns by following these steps.

1. Click the **Options** button on the upper right of the Smart Desktop.



2. Click **Add Column**.
3. Click the **Options** button to see the columns below the Widget tray.

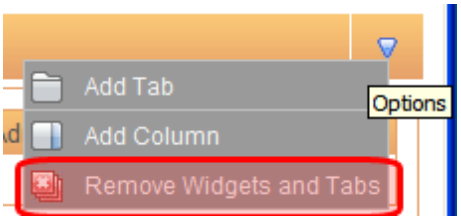


4. Now that you have four columns, search for the Content Checked out widget in the widget tray.
5. Drag and drop the ContentCheckedOut Widget into the first column.

Note: If your developers have not set up your analytics provider you will see the following error message when you try this exercise 'Username and/or password not set. Please update the AnalyticsDataProvider section on your web.config. Parameter name: Username, Password'

Restoring Tabs and Widgets

All users can restore their Smart Desktops to the Default Widget set. To do this, follow these steps.



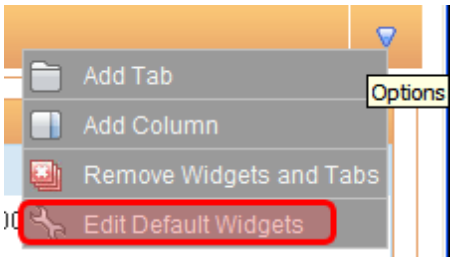
1. Click the **Options** button on the right side of the Smart Desktop.
2. Click **Remove Widgets and Tabs**.
3. When the dialog box appears that confirms you want to delete all Tabs and Widgets, click **OK**.

Setting the Default Widgets

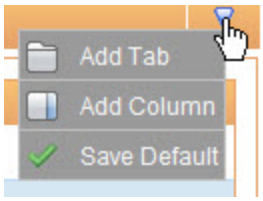
To*Setting the Default Widgets* above restore Default Widgets, you must be a member of the Administrators group.

Refer to "Restoring Tabs and Widgets" section of the Ektron CMS400.NET Reference Manual to restore Smart Desktop to the Default Widget set. The Default Widget set is defined by users in the Administrators group by doing the following.

1. Click the **Options** button on the right side of the Smart Desktop.
2. Click **Edit Default Widgets**.



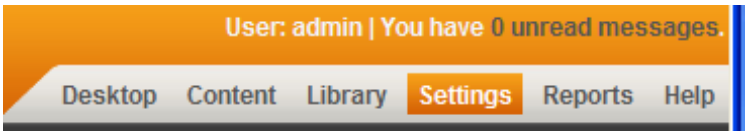
3. Arrange the Smart Desktop with Tabs and Widgets that you wish to be the default.
4. Click the **Options** button.
5. Click **Save Default** to save the Default Smart Desktop.



Unit 4 – Setup and Configurations

Configuration

After opening the Workarea, click on the "Settings" tab.

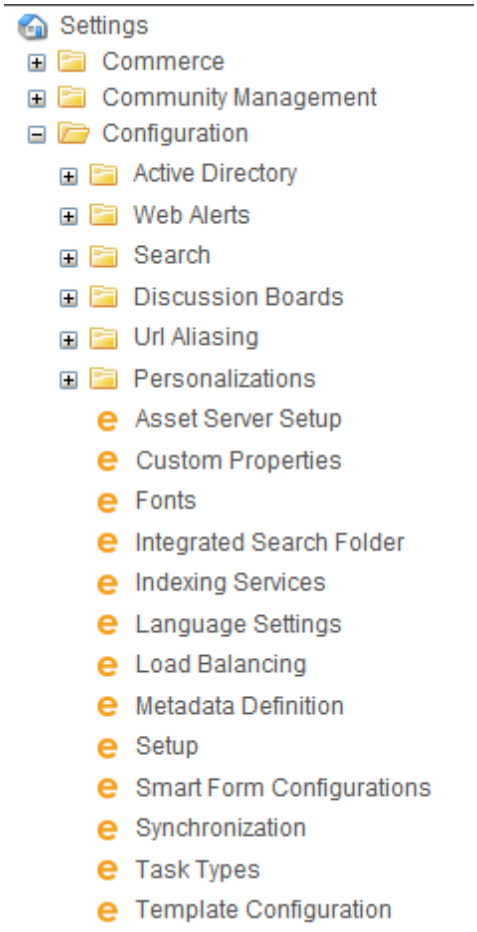


Next, open the "Configuration" folder by clicking on the (+) next to the folder icon.

Active Directory

The Active Directory feature allows you to retrieve user and user group information from the Microsoft Windows Active Directory (AD) into Ektron CMS400.NET. Users only need to login to their networks to get access to the CMS400.

(Refer to "Active Directory Feature" section of "Managing Users and User Groups" chapter in Ektron CMS400.NET Reference Manual)



Web Alerts

The Web Alert feature enables Ektron CMS400.NET to generate email for a list of registered users whenever new content appears on your site, or existing content is updated. (See Unit 32)

Search

Ektron CMS400.NET's Web site search provides extremely fast results by using Microsoft Indexing service and maintaining a catalog of all published content in local indexes. Additionally, features such as "Suggested Results", "Synonyms", and "Integrated Search" provide a variety of result options for the web site visitor (See Unit 21)

Discussion Boards

The Discussion Board feature provides an opportunity for topic discussions on your Web site. A site or membership user with Add Topic permission creates a topic and posts a starter question. Site visitors can then reply. (See Unit 35)

URL Aliasing

Aliasing is an Ektron CMS400.NET feature that lets you create alternate URL addresses for your Web site. This may improve usability and Search Engine Optimization (SEO) results for your site.(See Unit 17)

Personalization

This configuration sets the permissions that affect someone's ability to personalize

a page with widgets. Widgets are user controls that allow a site visitor to perform some sort of function like Weather, Clocks etc. (More on widgets in the PageBuilder exercises Unit 39)

Asset Server Setup

The Document Management System allows various types of documents and media files to be shown on a web site. By using drag-and-drop functionality, editors can add/edit these documents contained in the Asset Server. (See Unit 11)

Custom Properties

Allows you to create custom fields associated to a user. These custom fields appear on the user Properties and Membership User Properties screens and on the membership server control. (See Unit 18)

Fonts

As an administrator, you can add, edit, and delete fonts to and from the Ektron CMS400.NET Workarea. By adding fonts, you are allowing the content contributors to use them when creating content. (The CSS style sheet must be modified by the developer as well.) Administrators can also edit the name of a font, and delete a font from the system. Minimizing the number of available fonts makes the Web site look more uniform.

Integrated Search Folder

Use an Integrated Search if your site's search should include non-Ektron CMS400.NET files. Integrated Search locates data in a Web- accessible folder on the server's file system. This includes Virtual Folders for the Web Server (IIS). (See Unit 21)

Indexing Services

The Microsoft Windows Indexing service constantly indexes the catalog so that search results are returned with lightning speed. Another advantage of the indexing service is its robust query language.

Language Settings

The Language Settings screen lists all languages in which content can be created on your site.

Only members of the Administrator User Group can view, add, or edit language settings.

- Enable in Workarea only – This will enable new language support in the Workarea, which allows you to work in a language other than the default. Because it's enabled for the Work-area only, content in the new language is not available for public view.
- Enable on Web Site – This will enable public viewing of additional languages on your Web site.

If you enable a language on your Web site for which there is no content, content in the default language will be displayed instead.

Load Balancing

Asset and Library files may become out of date or lost due to equipment failures, power outages or other events. In addition to your Load Balance system, Ektron CMS400.NET provides a way to

refresh the files contained in the DMS Assets folders and Library Files and Images folders.

Metadata Definitions

Metadata is information about content such as title, description and keywords. There are many uses for metadata including SEO, content filtering, content association and more. (See Unit 16)

Setup

This section contains the license keys and configuration settings for the Workarea. (This will be covered in next section of this training manual –Section 4.2.)

Smart Form Configurations

Ektron CMS400.NET's Smart Forms give you access to the power of XML by separating Web content from presentation. (See Unit 15)

Synchronization

Ektron CMS400.NET's eSync automates the process of synchronizing content, folders, databases and templates. An entire Web site can be synchronized between two servers. This is an optional feature for Enterprise and Professional level CMS400.NET systems.

Task Types

Tasks can be assigned a Task Category, then a Task Type. This gives users an additional way to filter their tasks. Task Categories and Task Types have a hierarchical relationship: the Task Category is the parent, and the Task Type is the child. So, several types can be assigned to each category. (See Unit 14)

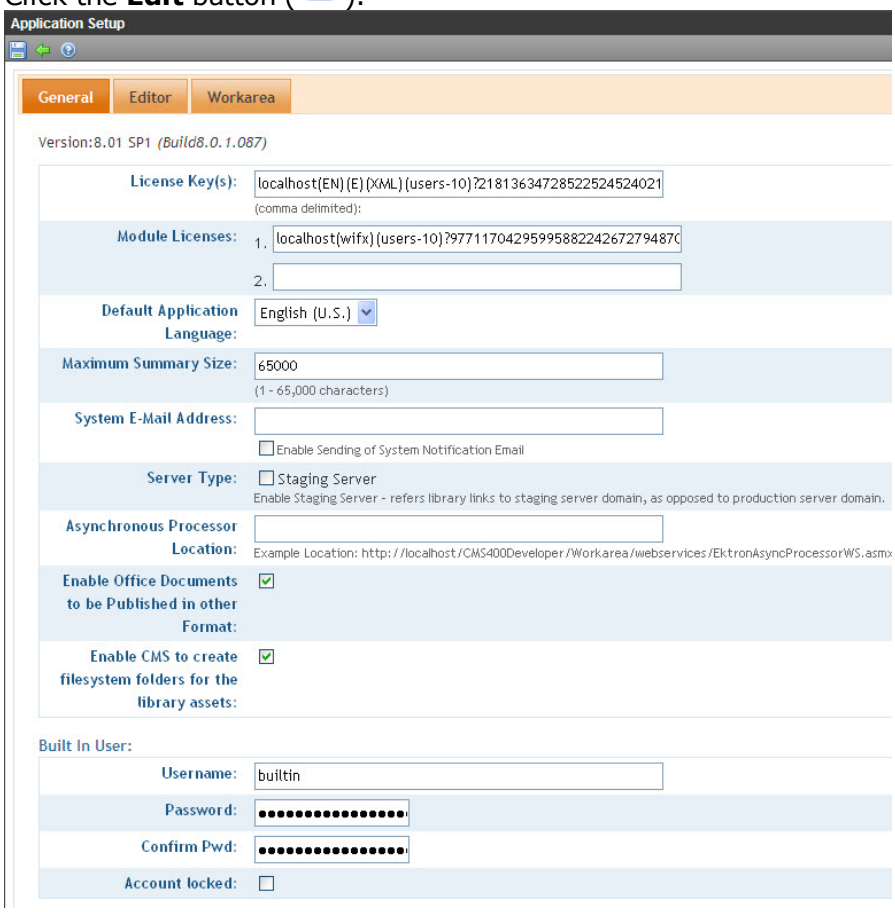
Template Configuration

Templates are created for your Web pages by developers. A template typically includes page headers and footers as well as placeholders for content, forms, summaries, calendars, collections, or other page elements and server controls. This configuration feature creates references for the CMS Workarea to Templates created for the web site. (See Unit 6)

Setup

Accessing the Setup Area

1. In the Workarea, click the **Settings** tab.
2. Expand the **Configuration** section.
3. Click on **Setup**.
4. Click the **Edit** button ( ).



5. When finished editing, click the **Update** button ( ) to save the changes.

License Keys

A license key typically begins with a base URL (domain name, computer network name, or IP address) followed by descriptor tags, a question mark, a series of numbers, a hyphen and one or two digits signifying release number.

For example:

dev.mysite.com(exp-2010-10-25)(modifiers)(users-10)?5151083779678606306492433 4416-80

License keys cannot contain spaces or line breaks.

Multiple license keys can be entered by separating them with comma, with no space in between.

There are three levels of license keys available for use with Ektron CMS400.NET.

The features that are available in your specific version of CMS400.NET depend on the license key you purchase.

This table shows the major features at each level.

Features List	Enterprise	Professional	Standard
eSync	✓	Optional	
Multisite	✓	Optional	
eCommerce	Optional	Optional	
Personalization	✓	✓	
XLIFF Support	✓	✓	
Document Management	✓	✓	
Social Networking	✓	✓	
URL Aliasing	✓	✓	✓
All Other Ektron CMS400.NET Features	✓	✓	✓

Module Key

If you are installing the optional image editor WebImageFX, you must enter the module key. The Module Key is for legacy support for CMS400.NET version 7.5 and earlier, version 7.6 and up has image editor built in to CMS400.NET.

Default Application Language

Select the default language for the CMS application. A user's language setting determines the screens and messages that appear in Ektron CMS400.NET. In the user profile, you can set each user's language. You can set any user's language to system default. Each user whose language is set to system default uses the language assigned here.

Maximum Summary Size

Administrators can set a limit on the maximum size for the summary.

System E-Mail Address

Enter a valid system e-mail address. All the notification e-mails sent to CMS users will have this e-mail address in the "From" area.

System Notifications

Enable or disable sending system e-mail to CMS users. (SMTP server configuration needs to be setup first in the web.config file in order to enable this service.) Email notifications and Web Alert examples are located in the back of this manual in the Appendix section.

Asynchronous Processor Location

The Web Alerts feature uses the Asynchronous Processor. Enter or update the location of the asynchronous processor Web Services file. Cut and paste the example location and change the server name to the appropriate server used by your site.

Publish in other format

Enable or disable publishing of Office documents in PDF format.

Library Folder Creation

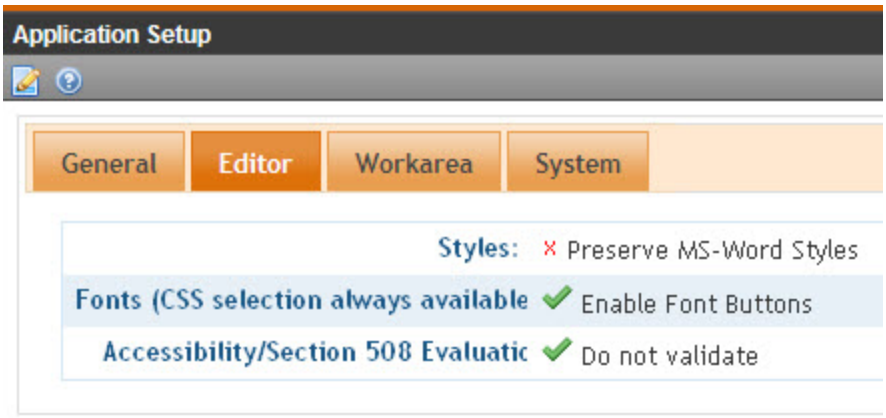
Enables or disables the creation of physical file folders for library assets to match the virtual folders in the CMS content folder structure.

Built In User

Here you can change the Username and Password for the "builtin" user ("builtin" is the default). This should be done before deployment of your site to the Internet.

Editor Options

Here you can enable or disable MS-Word Styles or Classes preservation, font buttons and accessibility / Section 508 (Citizens with Disabilities Act) compliance evaluation.



Best Practice Tips

Unless you have a specific need to do otherwise, we recommend leaving the Word preservation settings disabled and disabling the Fonts buttons. This allows you to control styles and fonts through style sheets, for ease of modification or design changes.

Work Page Size / Landing Page

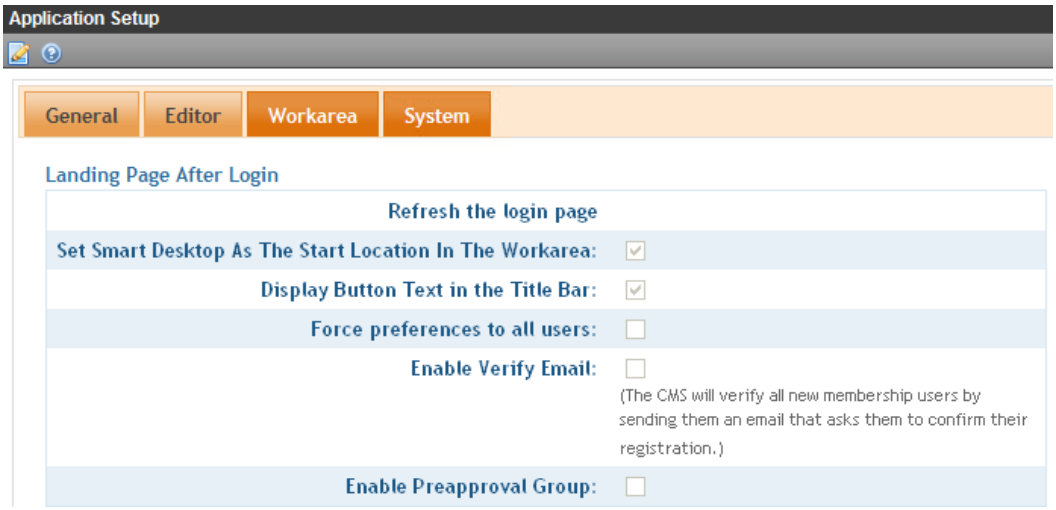
This is the setup for the size of the Workarea window and landing page after login. Normally, the default setting is sufficient. Each CMS user can customize their personal work page size and landing page.

Enable Verify E-mail

Enables sending of verification E-mails to new membership users.

Pre-approval Group

Enables a pre-approval group to evaluate content before it enters the regular approval chain and generates an automatic task.

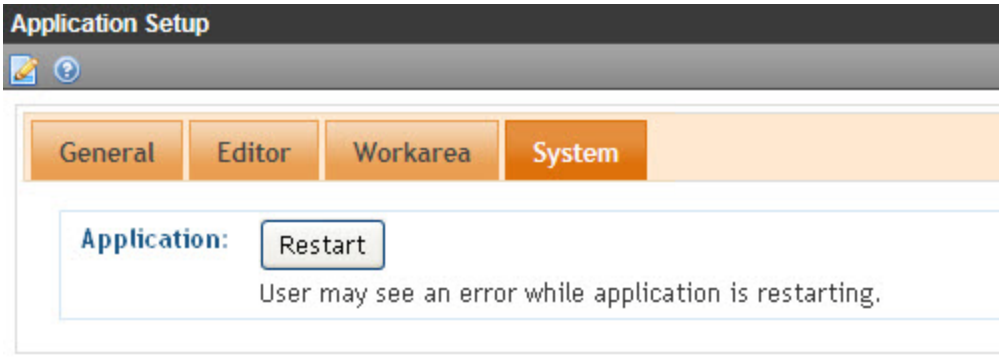

Application Setup
General
Editor
Workarea
System
Landing Page After Login
Refresh the login page
Set Smart Desktop As The Start Location In The Workarea:
Display Button Text in the Title Bar:
Force preferences to all users:
Enable Verify Email:
(The CMS will verify all new membership users by sending them an email that asks them to confirm their registration.)
Enable Preapproval Group:

System Reset

Use this button if you need to clear the CMS400.NET system cache, which recycles the application pool. For example, you updated the web.config file but cannot yet see the changes.

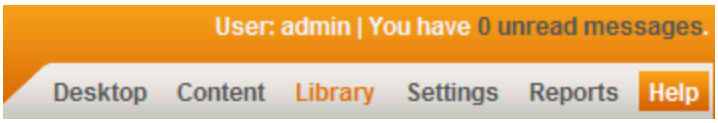
Under certain circumstances, Ektron's support group may instruct you to click this button.

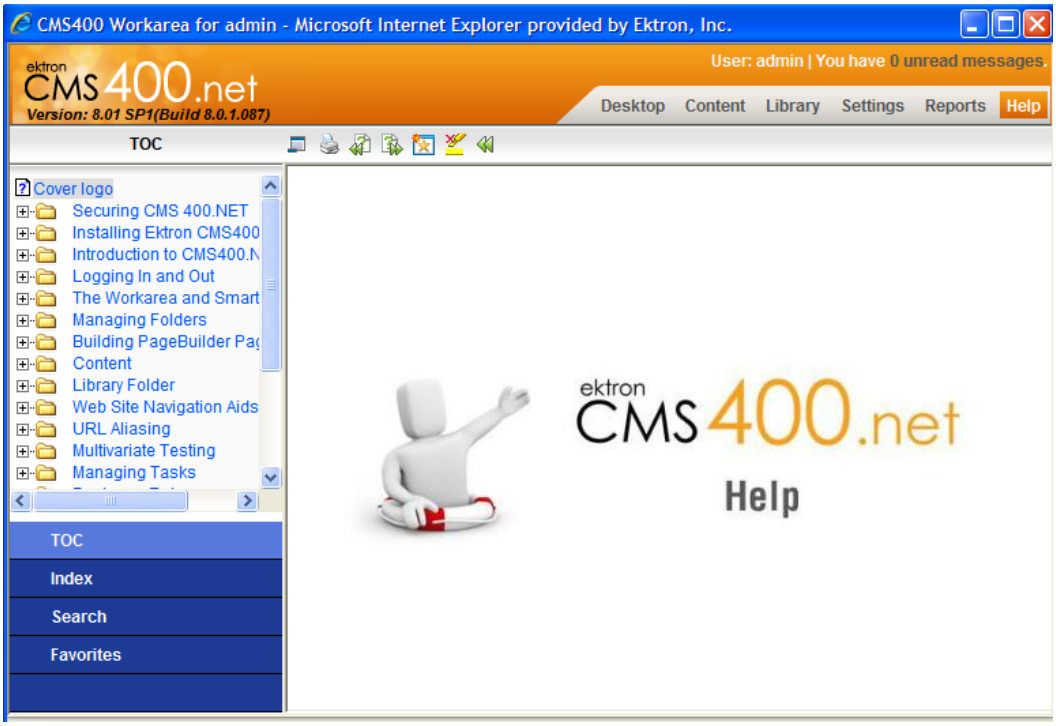
Administrators would use this button if they cannot access the hosting servers yet need to reset their web site. The button is an alternative to submitting a request to their IT department or hosting company.



Unit 5 – Help Systems and Documents

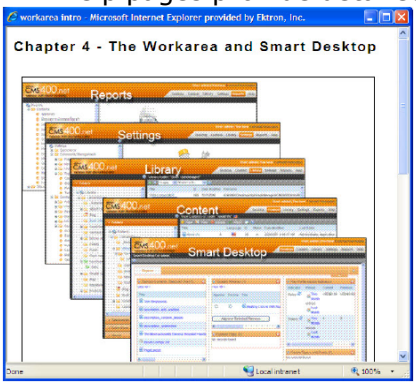
Documentation found in the workarea





Online Context Sensitive Help

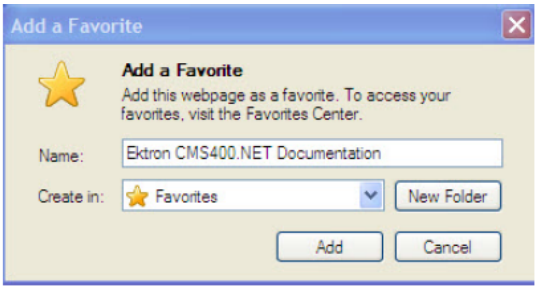
This help button is available to provide extra information about the area or procedure currently active in the Workarea. The HTML help pages provide detailed instructions about a feature or option.



Ektron Documentation on Public Web Site

http://www.ektron.com/documentation

Make sure you add it to your favorites so it is only a click away if need.



Documents are installed on the Web Server:

> All Programs -> Ektron -> CMS400Vxx -> Documentation

Unit 6 – Templates and Folders

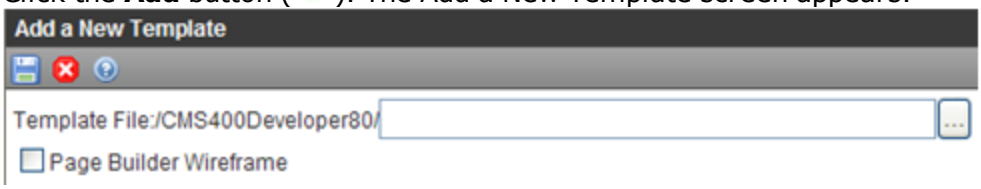
Understanding templates and folders is fundamental to understanding how the CMS works. Templates can be thought of as "content containers" in which content will be displayed. Content folders must have templates associated with them.

Adding Templates to the CMS

Templates are typically created by developers, with the role of the Administrator being to control the folder associations and request new templates if necessary. Before a template can be associated with a folder, a reference to it must be added in the CMS.

Exercise 6-1: Adding a New Template reference.

1. Click on the **Settings** tab in the left navigation pane of the Workarea.
2. Expand the **Configuration** section.
3. Click the **Template Configuration** link.
4. Click the **Add** button ( ). The Add a New Template screen appears.



5. Enter the path to the new template such as "NewTemplate.aspx" and click the Save button ( ).

Note: If the developer has created a template and placed it on the server, you can use the Select button ( ) to browse to the template and add it by clicking on the name of the template.)

Note: If you are adding a PageBuilder Wireframe template, select the "PageBuilder Wireframe" option. (See Unit 39)

Be sure to include the ".aspx" suffix, as it is not added automatically to the filename. If you forget the suffix, correct it using the update procedure below.

Exercise 6-2: Updating a Template reference.

The update command is used to change all references from an old to a new template.

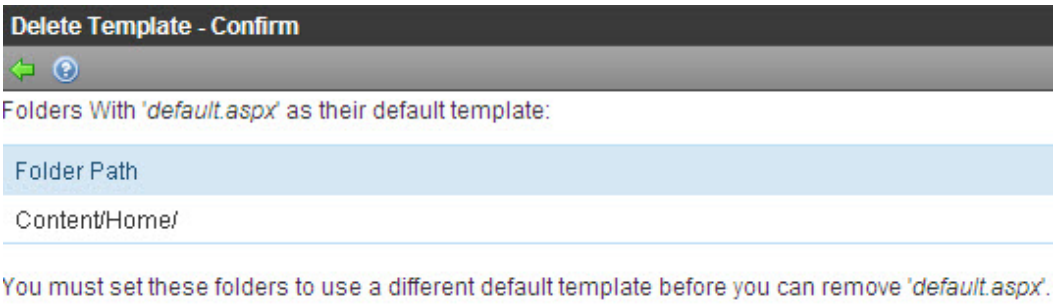
1. Click on the **template name** to update the template configuration.
2. A new screen appears.
3. Enter "NewTemplateV2.aspx".
4. Click the Update Template button ( ).

Exercise 6-3: Deleting a Template reference.

To delete a template, click **Delete** to the right of the template.

Warning! There is no confirmation before the template reference is deleted, so be certain that you select the correct template.

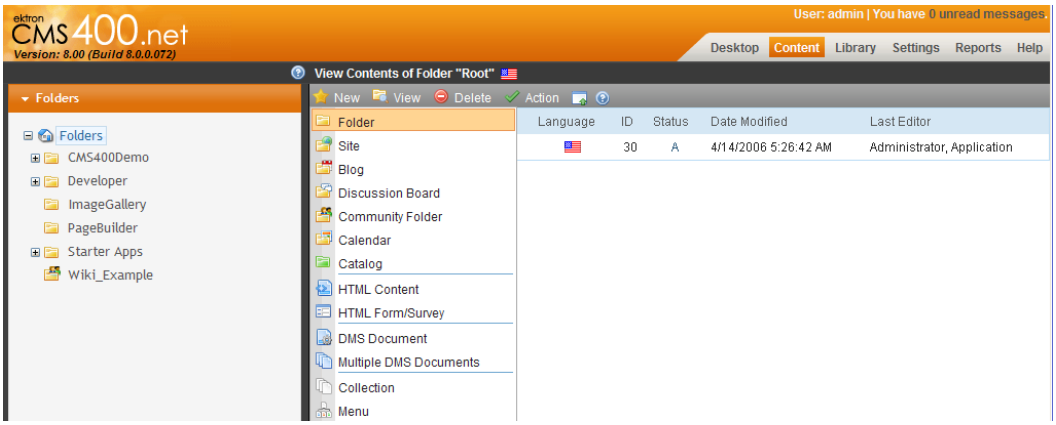
You can only delete a template if it is not assigned as a folder's default template. If you choose a template that is assigned as a default, a message is displayed indicating that the template cannot be deleted and it lists the folders for which it is the default:


Delete Template - Confirm
Folders With 'default.aspx' as their default template:
Folder Path
Content/Home/
You must set these folders to use a different default template before you can remove 'default.aspx'.

Note: If you delete a template reference that is not used as a default but is applied to content, that content's template is changed to its folder's default template.

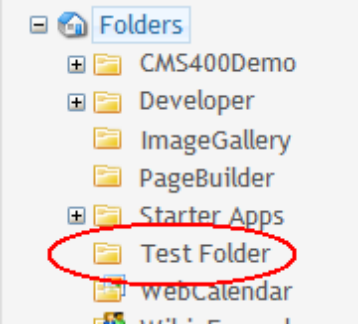
Creating Folders

Folders contain content items and also have properties which we will learn to set later in the training.



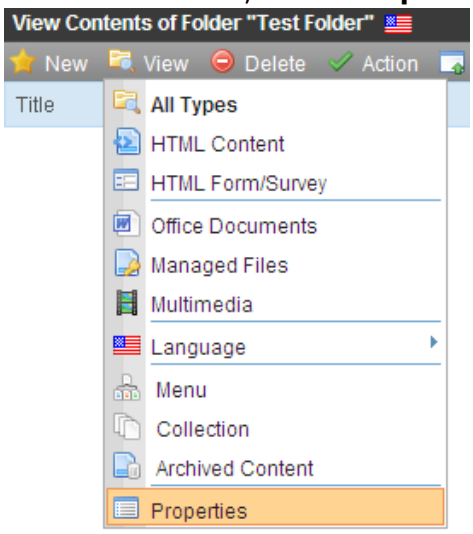
Exercise 6-4: Creating a New Folder.

1. In the Workarea, select the **Content** tab.
2. Select the **root** folder.
3. In the right pane toolbar, select **New > Folder**.
4. In the **Name** field, enter "Test Folder".
5. Click the **Add Folder** button ( ).

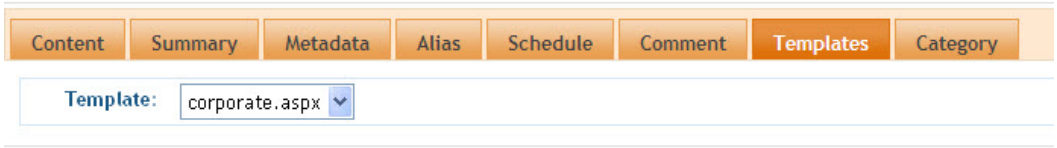


Exercise 6-5: Attaching a Template to the New Folder.

1. In the Workarea, click on the **Content** tab.
2. Click on "**Test Folder**".
3. On the View menu, select **Properties**.



4. Click the **Edit** button ( ).
5. Select the **Templates** tab.



6. Uncheck **Inherit Parent Configuration**.
7. On the [Select Template] dropdown list, click on "news.aspx" to select it.
8. Click on to the right of the template dropdown to add the template to the **Page Templates** list.
9. Click the radio button next to the news.aspx template to set it as default template for that folder.
10. Click on **View** to view a template.

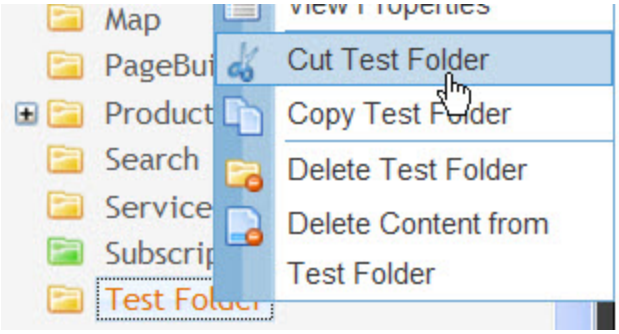
11. Click **Remove** to remove templates that are not the default.
12. Click **OK** to confirm that you want to delete the unwanted template.
13. Click the **Update** button ( ) to save the folder setting.

Best Practice Tips

We recommend that only one template be assigned to a folder. This eliminates the possibility of Content Editors selecting the wrong template for the content and having it display improperly on the Web site.

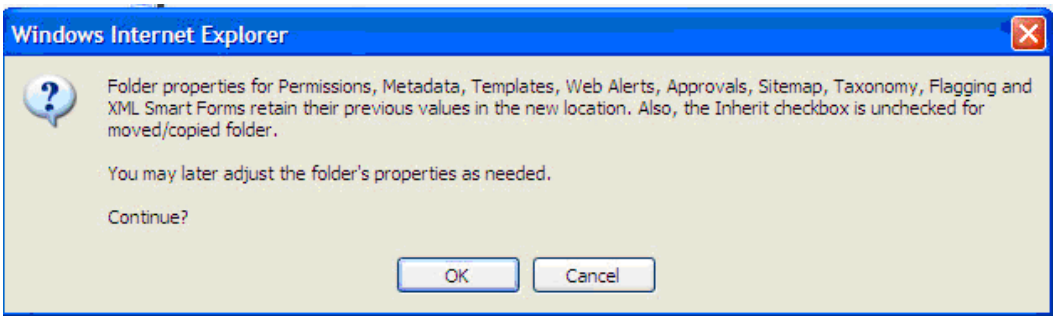
Exercise 6-6: Copying and Moving Folders

1. Right Click on your Training folder.
2. Select **Cut Test Folder.**



Note: To copy a folder with all of it's permissions and properties select copy folder and continue with the next steps.

3. Select the root **Folder**.
4. Right Click on Content and select Paste Folder
5. Select **OK** from the pop up window that will appear to warn you that all properties will remain the same when you move the folder.


Windows Internet Explorer
Folder properties for Permissions, Metadata, Templates, Web Alerts, Approvals, Sitemap, Taxonomy, Flagging and XML Smart Forms retain their previous values in the new location. Also, the Inherit checkbox is unchecked for moved/copied folder.
You may later adjust the folder's properties as needed.
Continue?
OK
Cancel

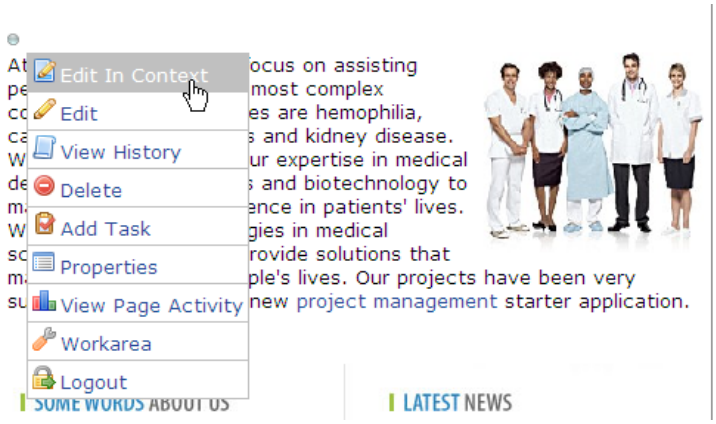
Your folder will now appear beneath the root folder.

Unit 7 – Editing Content

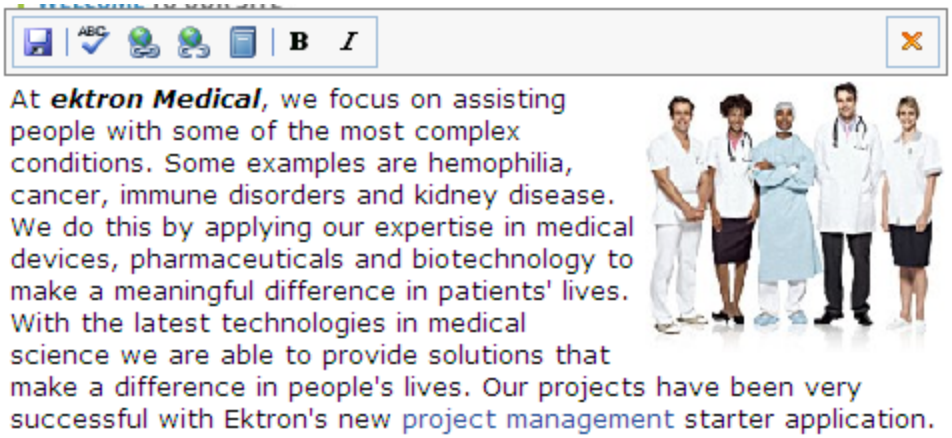
Reference: "Editing HTML Content" section of "Content" chapter in *Ektron CMS400.NET Reference Manual.*

Exercise 7-1: Editing in Context

1. Login to the CMS400Developer site using "admin" as your user and password. (http:/-/localhost/CMS400Developer/default.aspx)
2. Click on the silver "Access Point" in the upper left corner of the article entitled "Welcome to our site."



3. Choose **Edit In Context**.
4. Edit the Content by removing the sentence "Some examples are hemophilia, cancer, immune disorders and kidney disease."


At ektron Medical, we focus on assisting people with some of the most complex conditions. Some examples are hemophilia, cancer, immune disorders and kidney disease. We do this by applying our expertise in medical devices, pharmaceuticals and biotechnology to make a meaningful difference in patients' lives. With the latest technologies in medical science we are able to provide solutions that make a difference in people's lives. Our projects have been very successful with Ektron's new project management starter application.

5. Click **Save** ( ) to publish the change.

Exercise 7-2: Editing in a Web Browser

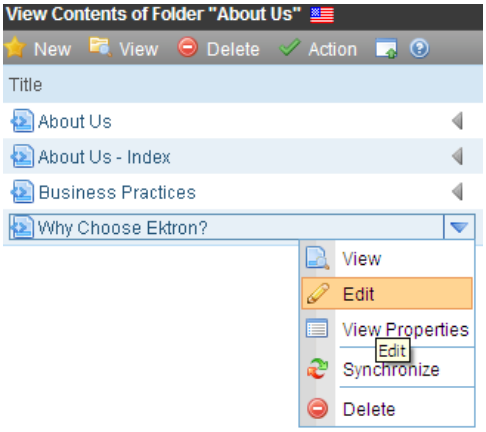
1. Click on the Access Point on the "Welcome To Our Site" content.
2. From the menu, choose **Edit**. The Edit Content window will appear with the content ready to be edited.
3. Change the content by removing the last two sentences and entering "Ektron training day."
4. Click the **Publish** button ( ). The article now shows the changes.

Best Practice Tips

Do not use the Red in the upper right corner of the window to close the Workarea. It is best to go to your browser and logout rather than exit using this window control. If you use this to close a content edit window, the content will remain in a "checked out" status.

Exercise 7-3: Editing in the Workarea

1. Open the Workarea.
2. Select the **Content** tab in the lower left pane.
3. Navigate to the **CMS400Demo > About Us** folder in the upper left pane.
4. Click on the arrow ( ) to the right of "Why Choose Ektron?" (Content ID 64) to show the drop down menu.
5. Click the Edit choice to enter edit mode for this content.
6. Make changes to the content.
7. After you finish editing, click the **Publish** button ( ). The edited content will appear as soon as you refresh the page in your browser.



Unit 8 – Adding Content

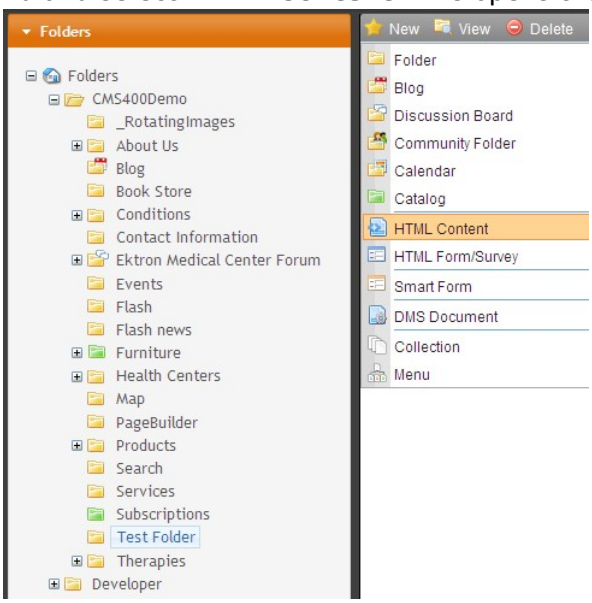
Reference: "Adding HTML Content" of "Content" chapter in *Ektron CMS400.NET Reference Manual.*

Content refers to anything that is going to be displayed on your Web site. In this unit, we will create new HTML content with text, images, tables and links.

Creating HTML Content

Exercise 8-1: Creating Content in the Workarea.

1. Select the **Content** tab in the Workarea.
2. Select the "**Test Folder**". (Created in exercise 6.2.)
3. Move the cursor over the **New** menu and select **HTML Content**. This opens the CMS Editor to allow you to add content:



4. In the title field, enter "Why Choose Ektron Medical?"
5. From the About Us menu on the Ektron Medical site, select "Why Choose Ektron?" (id 64).
6. Copy the following content and use "Paste Plain Text" ( ) to paste it into the "Paste Plain Text" pop up window.

7. Click OK to paste the text into the Content area.

Why Choose Ektron Medical?

An Exciting Environment

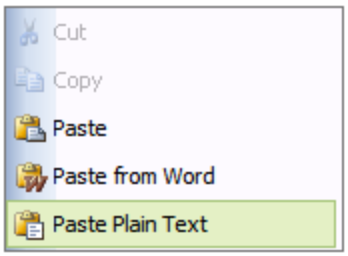
ektron Medical is a fast-paced technology-driven company that provides its employees with opportunities for professional growth, as well as the flexibility to achieve a balance between work and personal life. Being part of ektron Medical means working with teams that are involved with leading-edge research in groundbreaking areas of science and technology. It means opportunities to work with new manufacturing processes and in product development. It involves on-the-job training in sales and marketing. And it means working in a global environment as the company builds on its presence in international markets.

A Rewarding Career

ektron Medical provides comprehensive benefit, compensation and development programs that allow employees to grow in their careers. We encourage our employees to develop skills to meet the demands of an ever-changing work environment, providing them with opportunities to achieve personal and professional goals that will make them valued contributors throughout their careers.

Other rewards for our employees include the feeling of satisfaction when much-needed dialysis solutions are delivered to a homebound patient. And the feeling of accomplishment that comes from working towards clearly defined company goals in an environment that fosters shared values.

When pasting into the editor, right mouse to see these options:



Best Practice Tips

When pasting text into the Editor in WYSIWYG mode, you can right click in the text area and select "Paste Plain Text" to insert clean text into the content. This method removes all the extraneous tags that exist in Word documents or content copied from other Web sites.

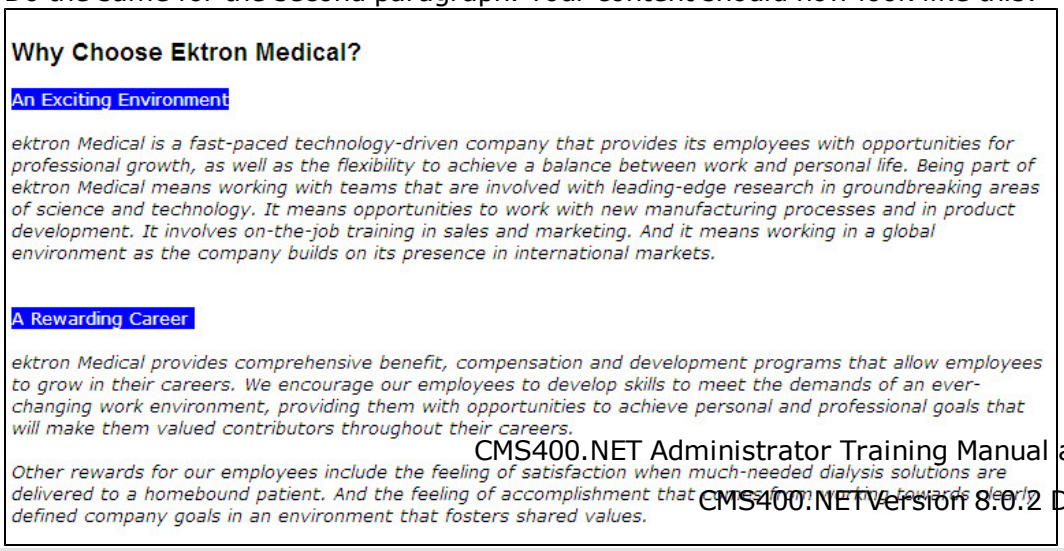
Exercise 8-2: Applying Styles to Content

By default, standard heading formats are available to content authors. Custom styles can also be created for content that is not going to be styled using external style sheets (CSS). If such styles exist, they are applied as follows:

1. Continue from the previous exercise.
2. Highlight the text "Why Choose Ektron Medical?"
3. From the Paragraph Format drop down select "Heading 3"
4. "Why Choose Ektron Medical?" should now have a Heading3 style applied.

Why Choose Ektron Medical?
An Exciting Environment
ektron Medical is a fast-paced technology-driven comp
opportunities for professional growth, as well as the fl
personal life. Being part of ektron Medical means worki

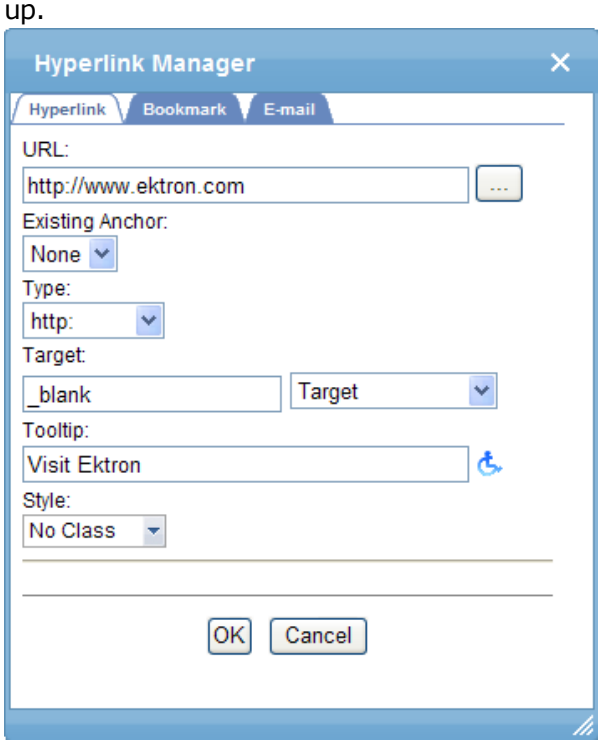
5. Highlight "An Exciting Environment ".
6. From Apply Style drop down list, select "bgcolorblue".
7. Do the same thing for "A Rewarding Career ".
8. Highlight the first paragraph and apply style "italic".
9. Do the same for the second paragraph. Your content should now look like this:


Why Choose Ektron Medical?
An Exciting Environment
ektron Medical is a fast-paced technology-driven company that provides its employees with opportunities for professional growth, as well as the flexibility to achieve a balance between work and personal life. Being part of ektron Medical means working with teams that are involved with leading-edge research in groundbreaking areas of science and technology. It means opportunities to work with new manufacturing processes and in product development. It involves on-the-job training in sales and marketing. And it means working in a global environment as the company builds on its presence in international markets.
A Rewarding Career
ektron Medical provides comprehensive benefit, compensation and development programs that allow employees to grow in their careers. We encourage our employees to develop skills to meet the demands of an ever-changing work environment, providing them with opportunities to achieve personal and professional goals that will make them valued contributors throughout their careers.
Other rewards for our employees include the feeling of satisfaction when much-needed dialysis solutions are delivered to a homebound patient. And the feeling of accomplishment that comes from meeting lowered clearly defined company goals in an environment that fosters shared values.

Exercise 8-3: Inserting Hyperlinks

External Hyperlinks

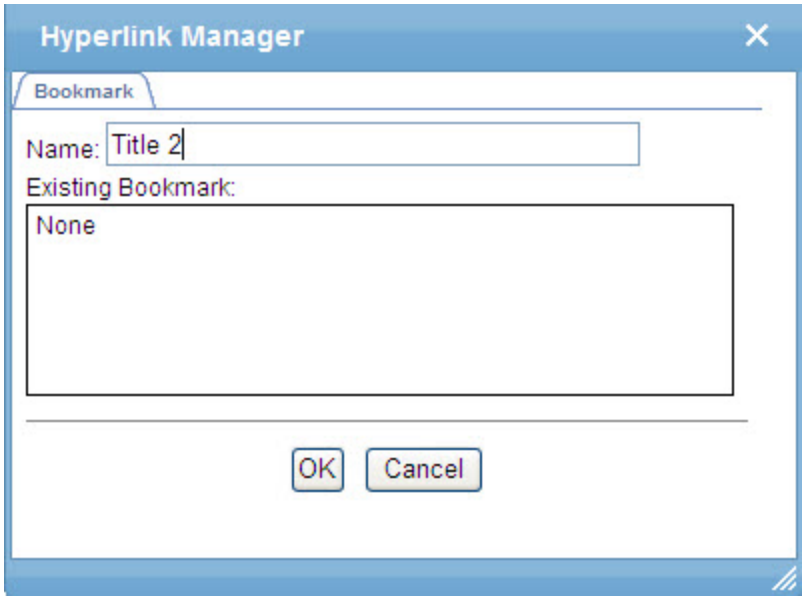
1. Click the end of the last line and press "Enter" twice to insert a blank line.
2. Type in "Visit Ektron".
3. Select (highlight) "Visit Ektron".
4. Click on the **Hyperlink Manager** button ( ) in the menu. The Hyperlink Manager pops-up.



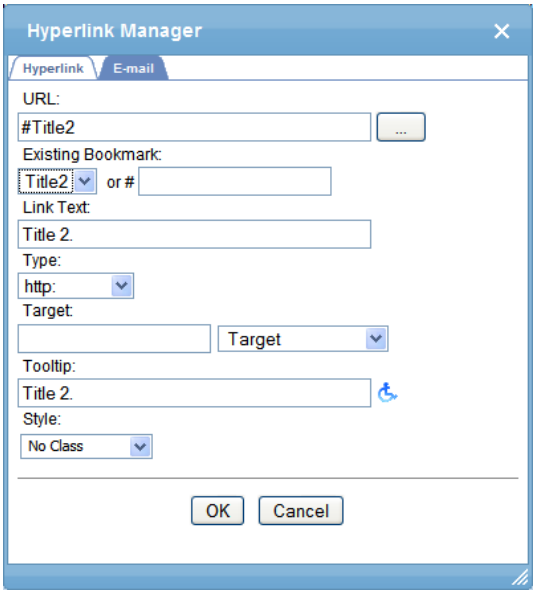
5. Make sure the text you highlighted "Visit Ektron" is in the Link Text field.
6. Set the URLfield to "http://www.ektron.com".
7. In the Target Frame, select "New Window (_blank)", so the resulting link will open in a new window.
8. Click OK. "Visit Ektron" now appears as a blue link.

Adding Bookmarks (Anchor) Hyperlinks

1. Add paragraphs to the content you are editing. (Paste in additional text to make it over one page long.)
2. After the last line, enter text "Title 2".
3. Click on the **Insert Bookmark** button ( ).
4. Enter the title of the bookmark as "Title2".



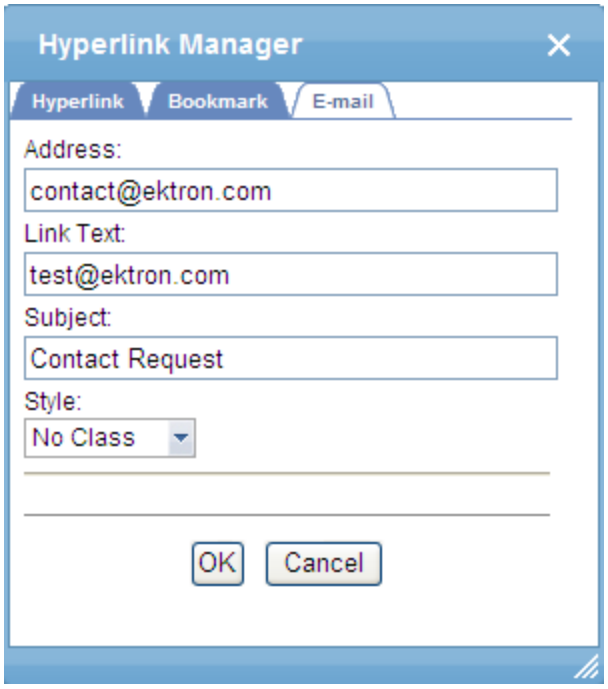
5. Click **OK**.
6. Go to the top of the content.
7. Enter a new line that says "Go to Title 2".
8. Highlight the text "Go to Title 2".
9. Click the **Hyperlink** Button ( ).
10. Select the **Existing Bookmark** for Title 2.



11. Click **OK** to save the link to the bookmark.

Email Hyperlinks

1. Go to next line and type "Contact us by email: "
2. Leave the cursor at the end of that line and click on the **Hyperlink** button ( ).

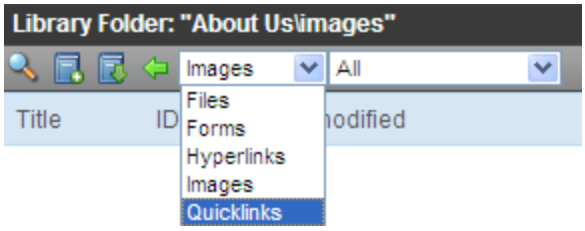


3. When the Hyperlink window pops up, select the **Email** tab.
4. Type "contact@ektron.com" in the address field.
5. In the **Link Text** field, type "test@ektron.com".
6. Click **OK** to close the Hyperlink window.

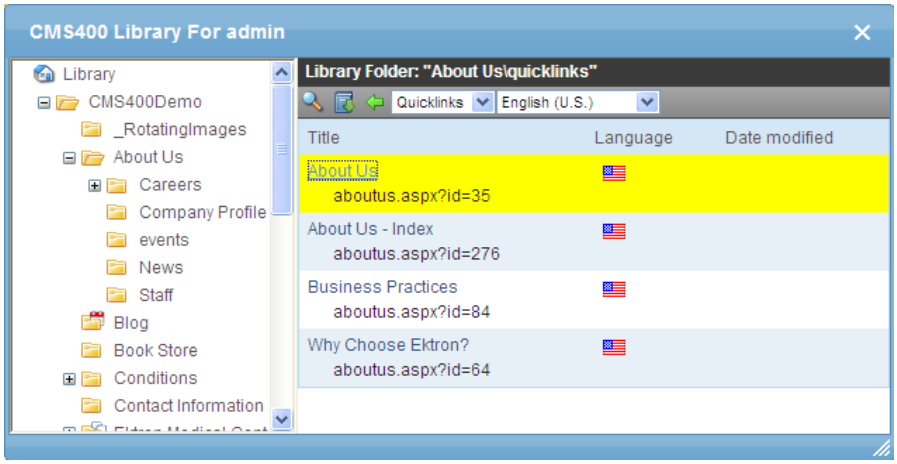
Note: This is not a real email address and students should not send email to this address.

Quicklinks link (from the Library) to other content in the CMS

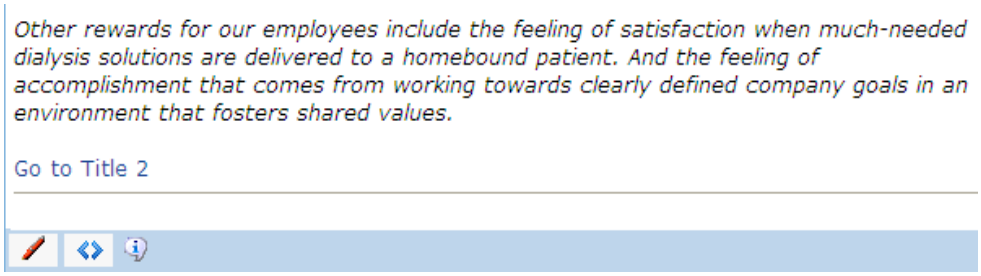
1. Go to the line after the e-mail link.
2. Click on the Hyperlink button ( ).
3. Click the three dots (...) button under the URL field.The Library window is now opened. Be sure the dropdown list says "Quicklinks".



4. Select the CMS400Demo ->About Us folder from the left navigation pane to display its Quicklinks.
5. Click on one of the Quicklinks so it is highlighted in yellow.
6. Click the Insert button ( ) to insert the Quicklink.
(Note: Double-clicking on a Quicklink will also insert it into the content and the Link Text will be the title of the content.)



7. Click **Ok** in the Hyperlink Manager.
8. Create a new line following the link you just created.
9. Click the Horizontal Line ( ) button in the menu to insert a horizontal line.You should have something like this in the Content window.


Other rewards for our employees include the feeling of satisfaction when much-needed dialysis solutions are delivered to a homebound patient. And the feeling of accomplishment that comes from working towards clearly defined company goals in an environment that fosters shared values.
Go to Title 2

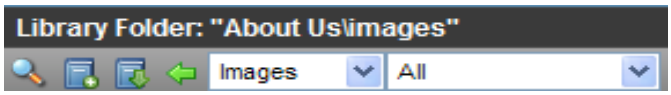
10. Click the Save button ( ) to temporarily save your work.

Exercise 8-4: Adding a Table

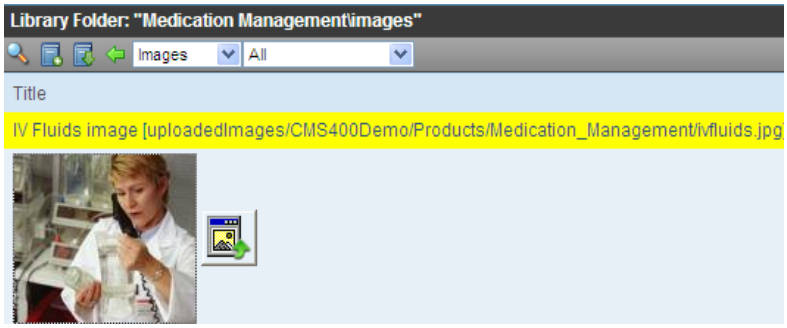
1. Move the cursor below the horizontal line in the content.
2. Click the Table button ( ).
3. From the popup menu, select Insert Table.
4. Mouse over 1 row and 2 columns. When you click, the table will be inserted.
5. Now you will have a table with 2 cells.

Exercise 8-5: Inserting an Image

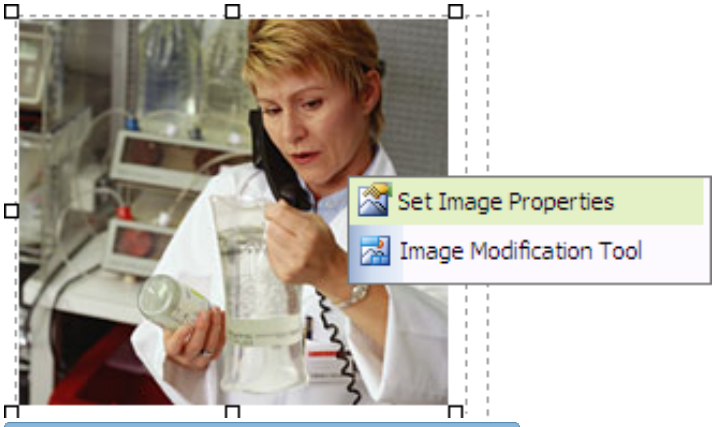
1. Click inside the left cell of the table.
2. Click the **Library** button ( ).
3. From the dropdown list, select **Images**.

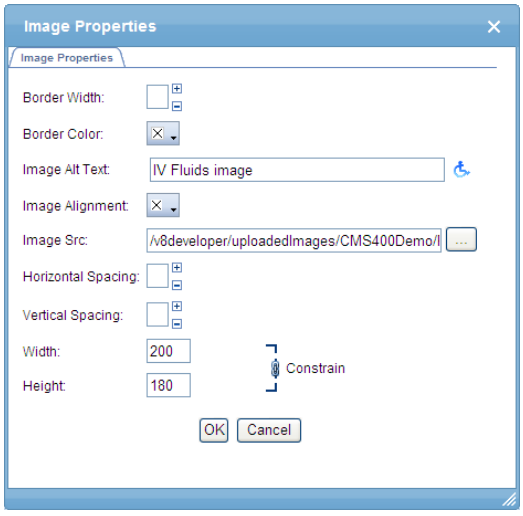


4. Browse to the folder **CMS400Demo > Products > Medications Management**.



5. Click on an image.
6. Click the **Insert** button ( ) to insert into the content. The picture will be inserted.
7. You can modify the image size, position, border and spacing by right clicking and choosing **Set Image Properties**.

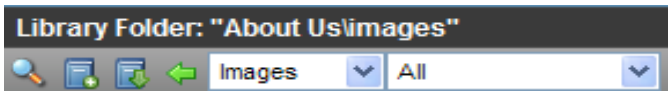




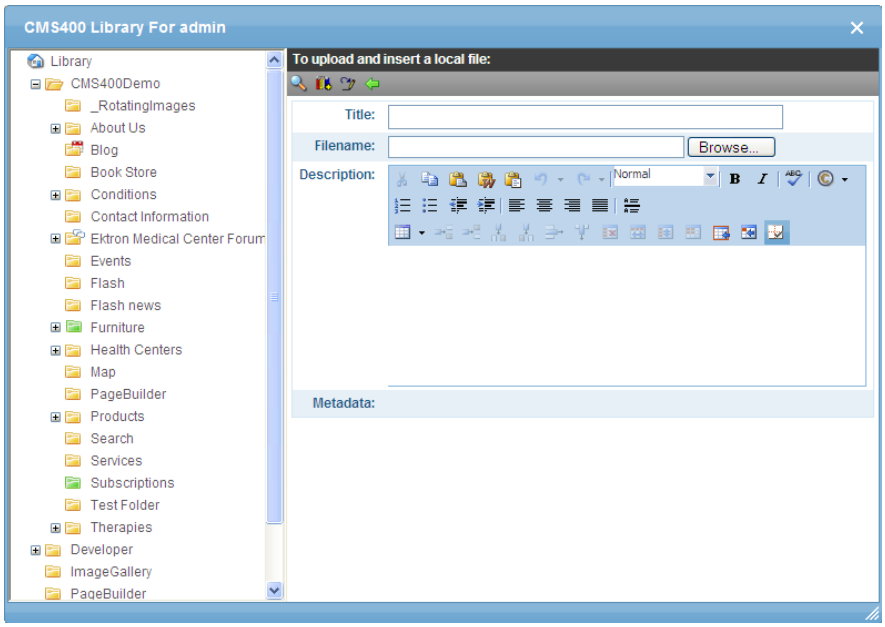
8. Once you are satisfied with the settings, click **OK** and the picture properties will be changed.

Exercise 8-6: Uploading and Inserting an Image

1. Position the cursor where you would like to insert an image and click the **Library** button ( ).
2. Navigate to the folder **CMS400Demo->Test Folder**.
3. Click the Add Library button ( ) to add a new image to the library.

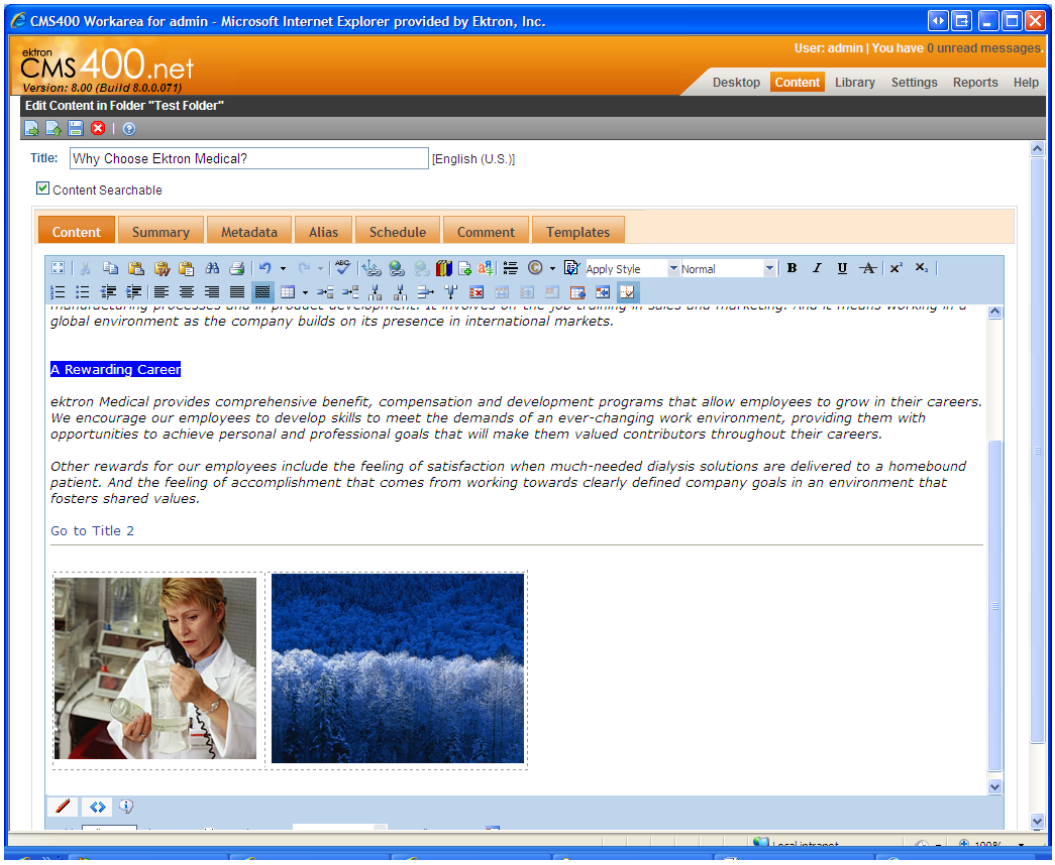


4. Click the **Browse** button. This opens a standard browser window for browsing local or network drives for an image. Select an image and click Open.



5. Enter a title for the image.
6. Click the **Add Library** button ( ) again to add the new image to the Library.

7. Click **OK**. The image you selected is added to the content.


CMS400 Workarea for admin - Microsoft Internet Explorer provided by Ektron, Inc.
CMS400.net
Version: 8.00 (Build 8.0.0.071)
User: admin | You have 0 unread messages
Desktop Content Library Settings Reports Help
Edit Content in Folder "Test Folder"
Title: Why Choose Ektron Medical?
[English (U.S.)]
Content Searchable
Content Summary Metadata Alias Schedule Comment Templates
global environment as the company builds on its presence in international markets.
A Rewarding Career
ektron Medical provides comprehensive benefit, compensation and development programs that allow employees to grow in their careers. We encourage our employees to develop skills to meet the demands of an ever-changing work environment, providing them with opportunities to achieve personal and professional goals that will make them valued contributors throughout their careers.
Other rewards for our employees include the feeling of satisfaction when much-needed dialysis solutions are delivered to a homebound patient. And the feeling of accomplishment that comes from working towards clearly defined company goals in an environment that fosters shared values.
Go to Title 2

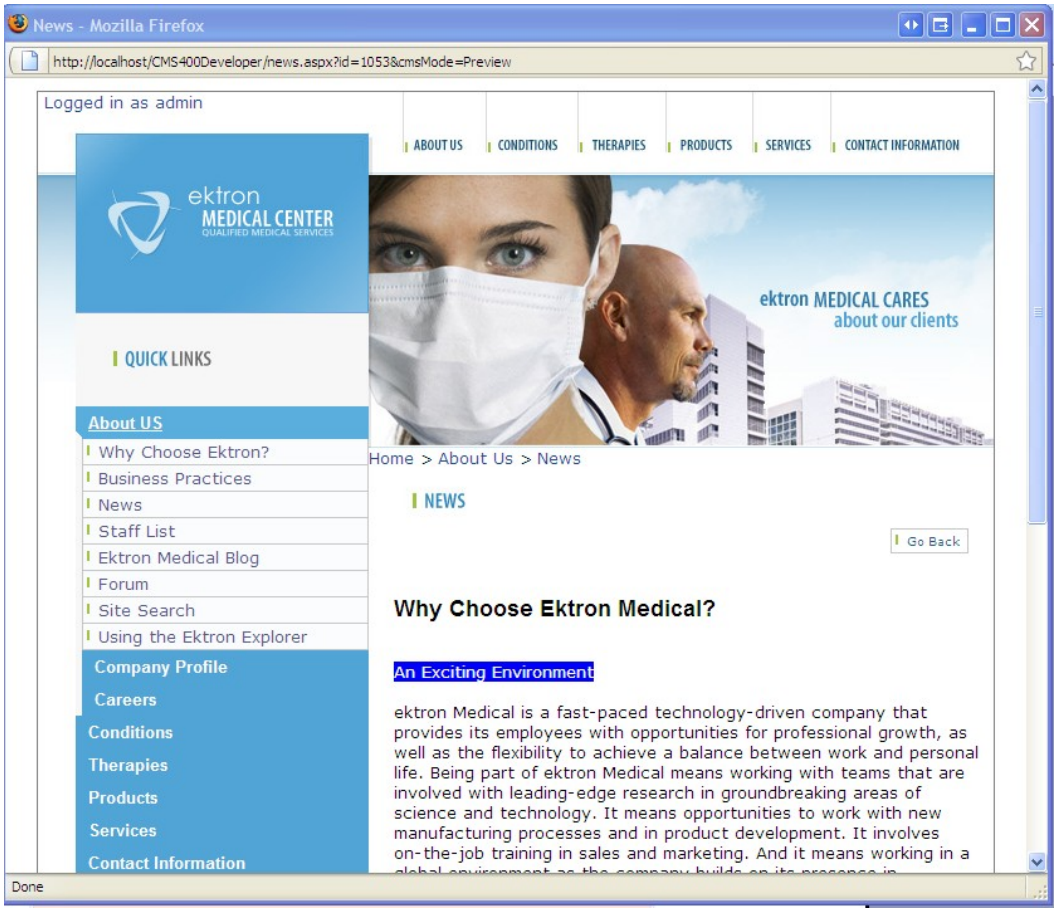
8. Click the **Save** button ( ) again to temporarily save your work.

Exercise 8-7: Previewing Content

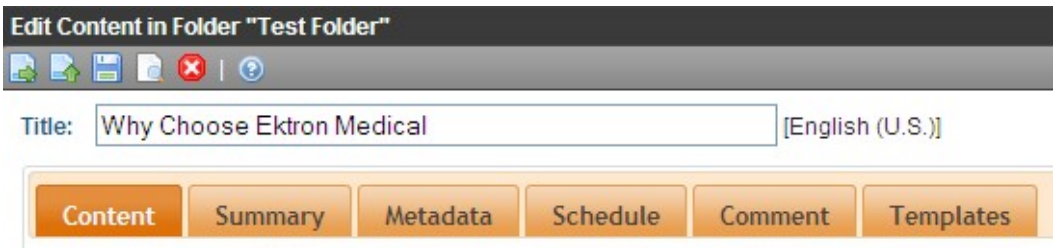
1. THis tool bar appears while editing content. You can Publish, Check-in, Save, Preview content or cancel your changes.

2. Select Preview( ) to see your content as it will look when you publish it.

3. The content appears in the default template - in this case, news.aspx.

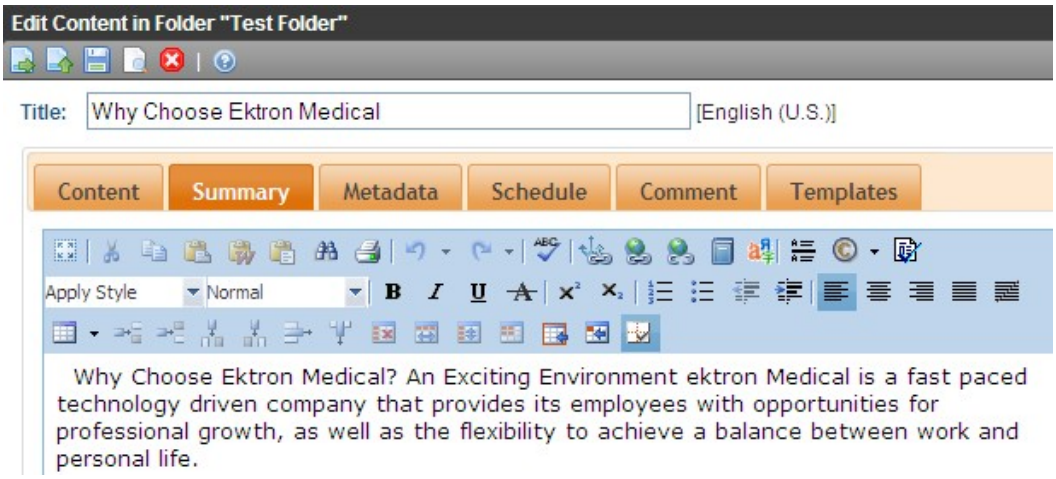

News - Mozilla Firefox
http://localhost/CMS400Developer/news.aspx?id=1053&cmsMode=Preview
Logged in as admin
ABOUT US
CONDITIONS
THERAPIES
PRODUCTS
SERVICES
CONTACT INFORMATION
ektron MEDICAL CENTER
QUALIFIED MEDICAL SERVICES
ektron MEDICAL CARES
about our clients
QUICK LINKS
About US
Why Choose Ektron?
Business Practices
News
Staff List
Ektron Medical Blog
Forum
Site Search
Using the Ektron Explorer
Company Profile
Careers
Conditions
Therapies
Products
Services
Contact Information
Home > About Us > News
NEWS
Go Back
Why Choose Ektron Medical?
An Exciting Environment
ektron Medical is a fast-paced technology-driven company that provides its employees with opportunities for professional growth, as well as the flexibility to achieve a balance between work and personal life. Being part of ektron Medical means working with teams that are involved with leading-edge research in groundbreaking areas of science and technology. It means opportunities to work with new manufacturing processes and in product development. It involves on-the-job training in sales and marketing. And it means working in a
Done

Adding Other Information to Content



Exercise 8-8: Adding Summary Information

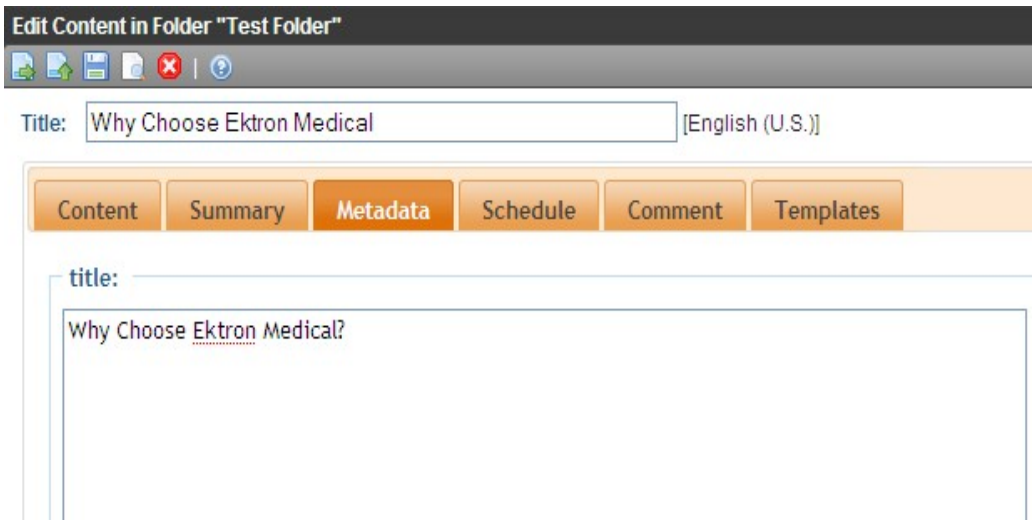
Summary information is text that sometimes appears in Search Results and when "Teaser Text" is shown on ListSummary or Collections. Adjust this text in any way you choose. If the summary is blank, it is filled in automatically with approximately the first 40 words of the text in the main content.


Edit Content in Folder "Test Folder"
Title: Why Choose Ektron Medical
[English (U.S.)]
Content
Summary
Metadata
Schedule
Comment
Templates
Apply Style
Normal
Why Choose Ektron Medical? An Exciting Environment ektron Medical is a fast paced technology driven company that provides its employees with opportunities for professional growth, as well as the flexibility to achieve a balance between work and personal life.

Exercise 8-9: Adding Metadata

Metadata is important for Search Engine Optimization (SEO), as well as for internal site searches and tagging content for special attention in the CMS.

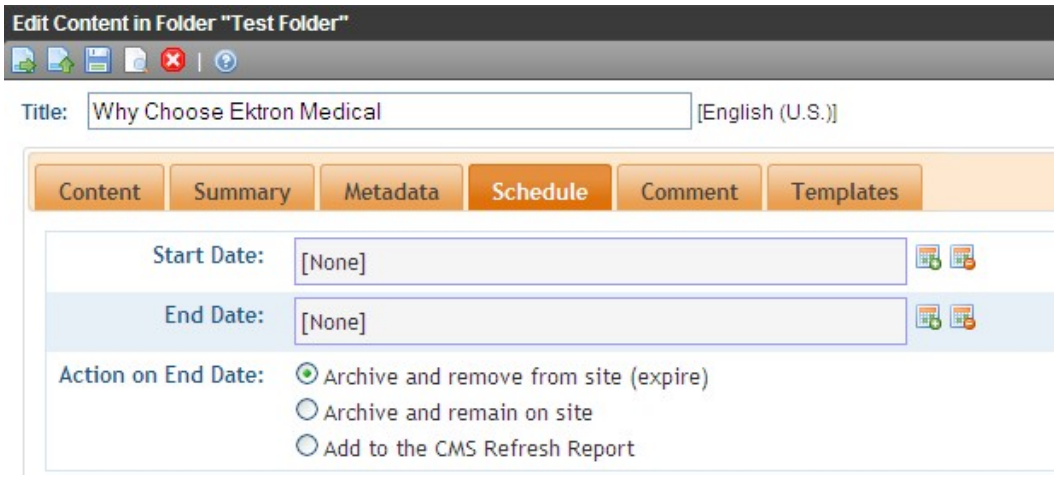
1. Click the Metadata tab.



2. For the Title field, enter "Why Choose Ektron Medical?"
3. For the Description field, enter "The two main reasons for choosing Ektron Medical are an exciting environment and a rewarding career."
4. For Keywords, enter "Ektron" in the Text box then click "Add".
5. Add another keyword by entering "Medical" and then click "Add".

Exercise 8-10: Content Scheduling

1. Click the **Schedule** tab.



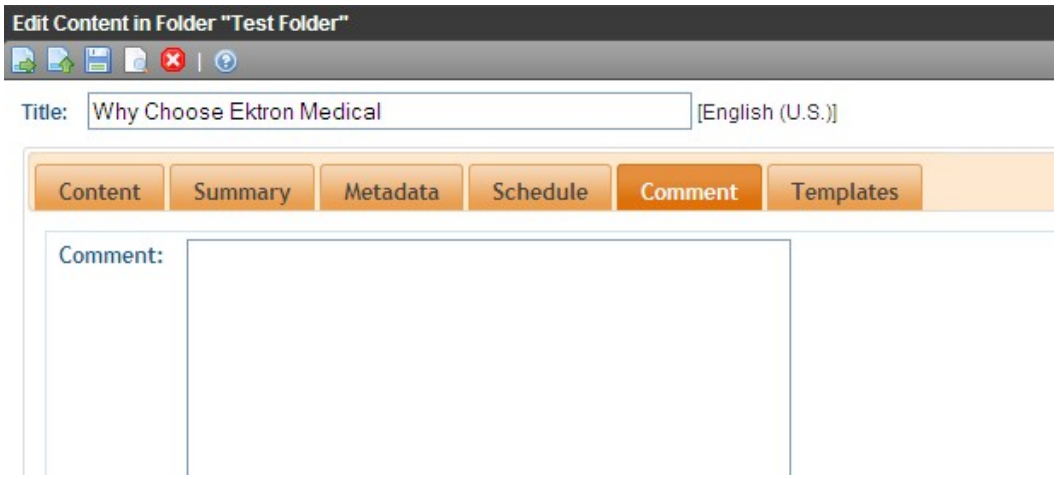
2. Click the **Select a Date and Time** button ( ) next to the End Date.
3. In the pop up window, select a date and hour you want this content to be archived.
4. Click **Done**.
5. Select the radio button **Archive** and remove from site (expire).
6. If you publish the content at this point, the schedule will apply.

Note: Before proceeding with other exercises in class, REMOVE the schedule date by clicking the **Delete the Date and Time** button ( ). This will allow you to see this content in the next lessons.

Exercise 8-11: Adding Comments to Content

Comments are used for internal communication about content and are not visible to visitors to the site. Comments make it easier and faster to determine the changes made between versions of the content.

1. Click the **Comment** tab.

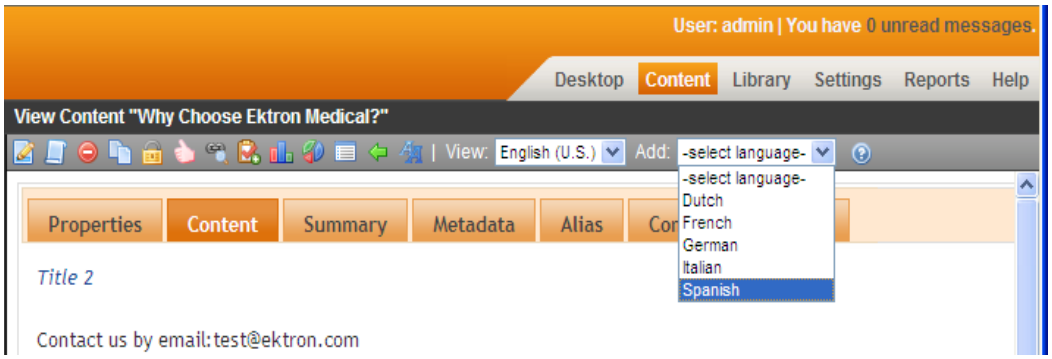


2. Enter your comments in the **Comment** box.
3. Click the **Publish** button ( ) in the tool bar.

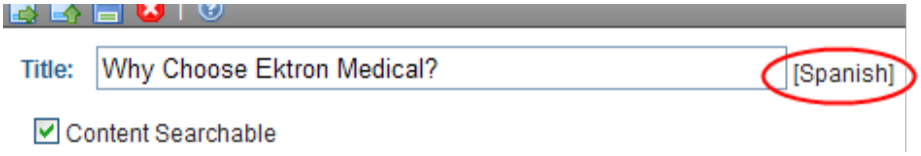
Exercise 8-12: Creating Content in another language

Content can be managed within the CMS translated into different languages. The Language selector on the website is used to select which translation the visitor will view. Steps to translate content to Spanish are as follows:

1. Click on **Test Folder** in the Content Workarea.
2. Click on your first article entitled "Why Choose Ektron Medical?"
3. On the toolbar, select **Add:** and choose **Spanish**.



Notice that the Title now indicates you are working on the Spanish version.

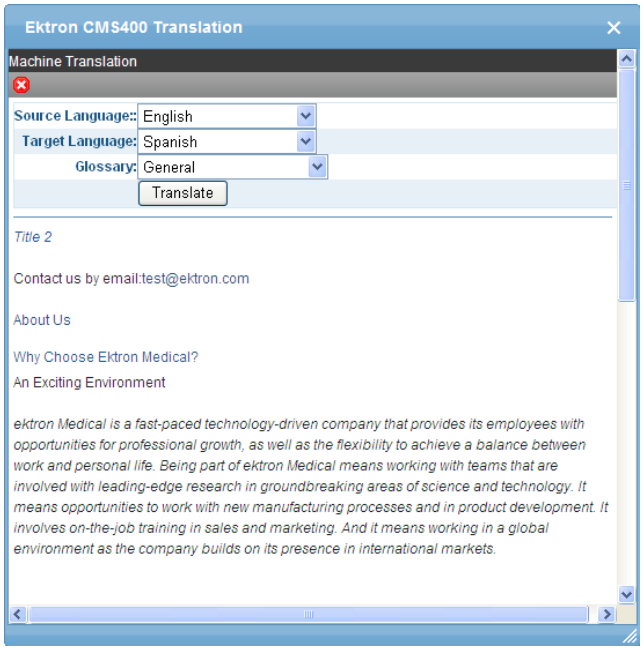


A Computer based translator function (machine translation) is available on the editor.

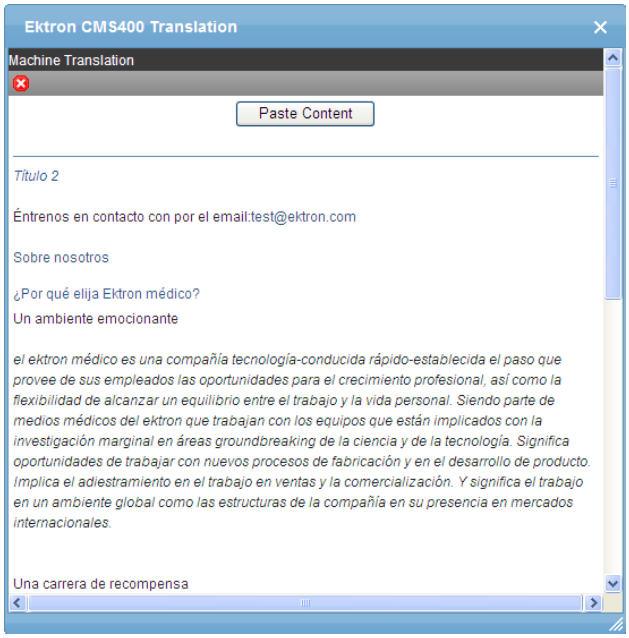
1. While in edit mode of the Spanish version of the content, click on the **Translate Content** button.

2. Select **English** as the source language.
3. Select **Spanish** as the target language.

4. Click on the **Translate** button.


Ektron CMS400 Translation
Machine Translation
Source Language:: English
Target Language: Spanish
Glossary: General
Translate
Title 2
Contact us by email:test@ektron.com
About Us
Why Choose Ektron Medical?
An Exciting Environment
ektron Medical is a fast-paced technology-driven company that provides its employees with opportunities for professional growth, as well as the flexibility to achieve a balance between work and personal life. Being part of ektron Medical means working with teams that are involved with leading-edge research in groundbreaking areas of science and technology. It means opportunities to work with new manufacturing processes and in product development. It involves on-the-job training in sales and marketing. And it means working in a global environment as the company builds on its presence in international markets.

5. After the content is translated, click on the **Paste Content** button to replace the original version with the translated version.


Ektron CMS400 Translation
Machine Translation
Paste Content
Título 2
Éntrenos en contacto con por el email:test@ektron.com
Sobre nosotros
¿Por qué elija Ektron médico?
Un ambiente emocionante
el ektron médico es una compañía tecnología-conducida rápido-establecida el paso que provee de sus empleados las oportunidades para el crecimiento profesional, así como la flexibilidad de alcanzar un equilibrio entre el trabajo y la vida personal. Siendo parte de medios médicos del ektron que trabajan con los equipos que están implicados con la investigación marginal en áreas groundbreaking de la ciencia y de la tecnología. Significa oportunidades de trabajar con nuevos procesos de fabricación y en el desarrollo de producto. Implica el adiestramiento en el trabajo en ventas y la comercialización. Y significa el trabajo en un ambiente global como las estructuras de la compañía en su presencia en mercados internacionales.
Una carrera de recompensa

6. Click the **Publish** button ( ) to publish your Spanish Content.

To view your content, go to:

http://localhost/cms400developer/news.aspx?id=xxx

xxx=the id of your content

Note: Be sure to remember to translate your "Title" and "Summary" text too..

Unit 9 – Adding Content to a ListSummary

Reference: "Website Navigation Aids" chapter in *Ektron CMS400.NET Reference Manual.*

The ListSummary is used to display a list of content items in a selected folder. Optionally, the display can include content in all subfolders of the selected folder. It displays each content item's' title and summary, as in the following example from the **About Us > News** folder:

Ektron Rated Positive
Ektron Inc., an innovator in Web content management software, today announced ...
Ektron to Demonstrate Healthcare
"Healthcare Content Indexing Framework" which enables hospitals, medical groups and health insurers to deliver indexed content via the Web.

Exercise 9-1: Creating New Content in a ListSummary

1. On the Ektron Medical home page, go to the About Us > News page.
2. Hover over Access Point and choose "Add HTML Content" from the menu.

3. Click **Add HTML Content** then add some text.
4. Publish the new content.

Note: The content must be published to show in a ListSummary. New Content that is checked-in or saved or scheduled to go-live later will not appear in a ListSummary.

The new content is added automatically to the ListSummary.

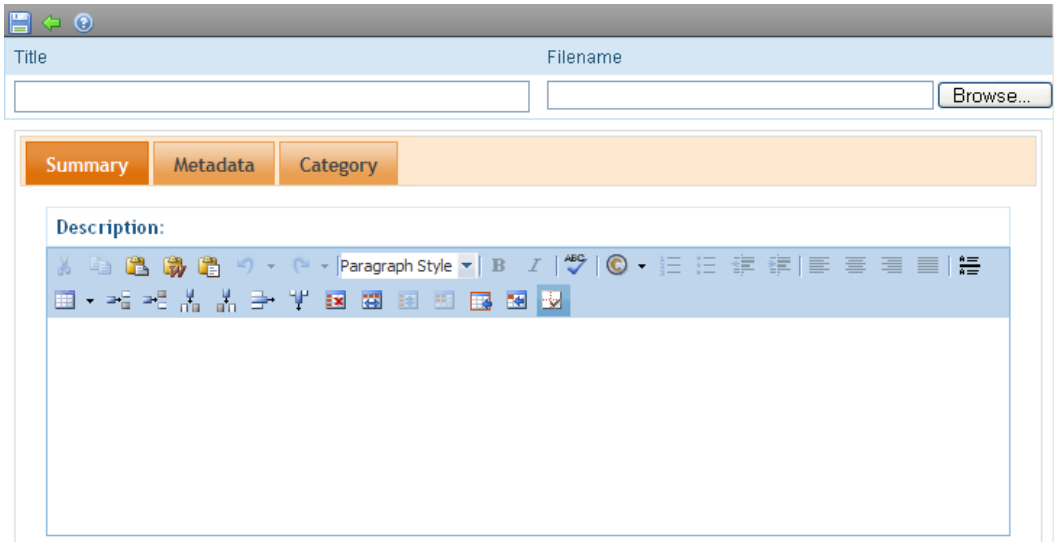
Unit 10 – Adding Images & Hyperlinks to the Library

Reference: "Library Folder" chapter in *Ektron CMS400.NET Reference Manual.*

Adding Images and Hyperlinks to the CMS Library makes them readily available for use when creating or editing content.

Exercise 10-1: Adding an Image

1. In the Workarea select the **Library** tab.
2. Go to the folder **CMS400Demo >Test Folder**.
3. From the drop down list, select Images.
4. Click the **Add** button ( ).The Add Library Item window appears.

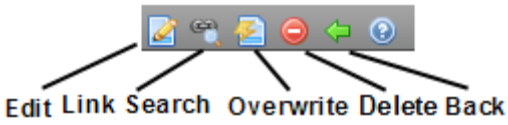


5. Click the **Browse** button to browse your local or network drives to locate an image.
6. Enter a title for the image and add a Description if needed.
7. Click the **Save** button ( ). The image is added to the Library.

Exercise 10-2: Editing Image Properties

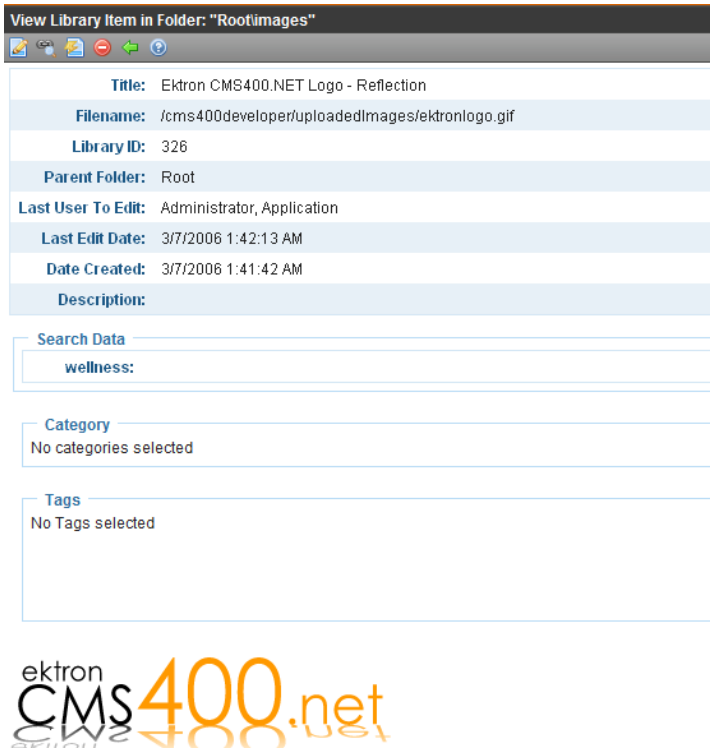
1. In the Library, click the image you want to edit.
2. Click the **Edit** button (See figure.)
3. Edit the title or description of the image.

4. Click **Update** ( ).



Exercise 10-3: Link Search

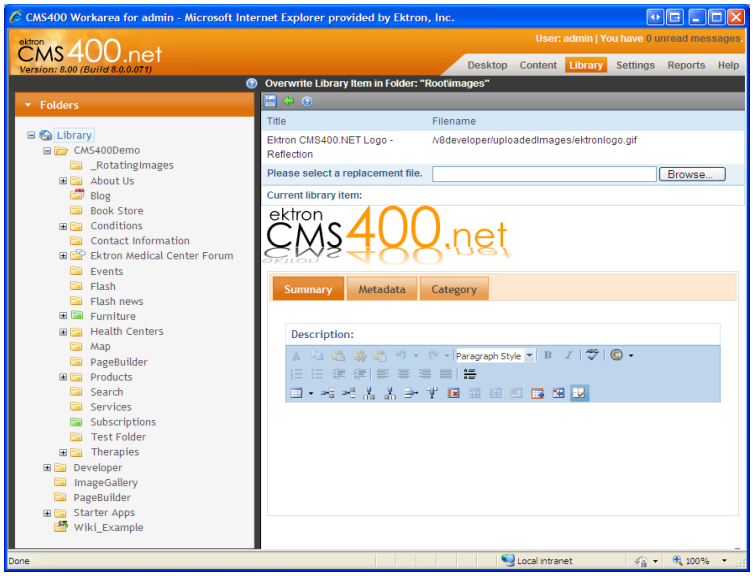
1. Click Library at the top of the library folders tree.
2. Click on the Ektron CMS400.NET Logo image (id 326).



3. Click the **Link Search** ( ) button to show content that uses this library item.
4. You now will see a list of content items that use this image.

Exercise 10-4: Overwriting an Image

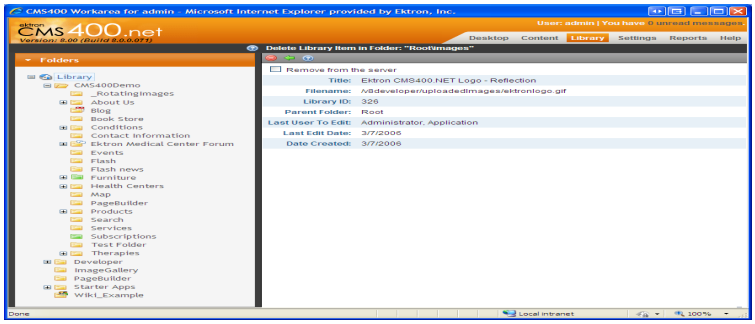
1. Click the image you want to overwrite.
2. Click the **Overwrite** button ( ).



3. Click **Browse** to select the replacement image.
4. Click **Update** ( ).
5. Click **OK** in the popup box to overwrite the old image with the new one.

Exercise 10-5: Deleting an Image

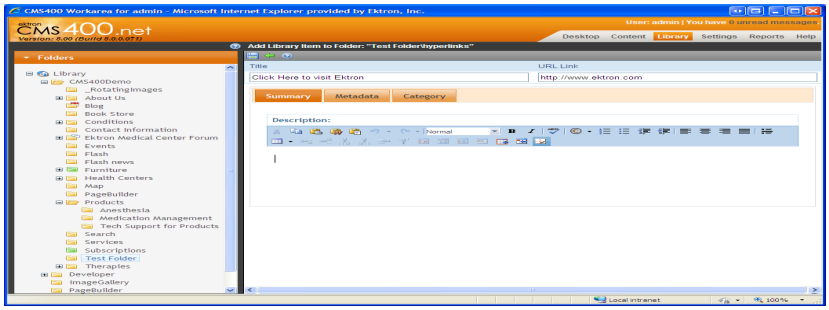
1. Click the image you want to delete


CMS400 Workarea for admin - Microsoft Internet Explorer provided by Ektron, Inc.
CMS400.net
Delete Library Item in Folder: "RootImages"
Folders
Remove from the server

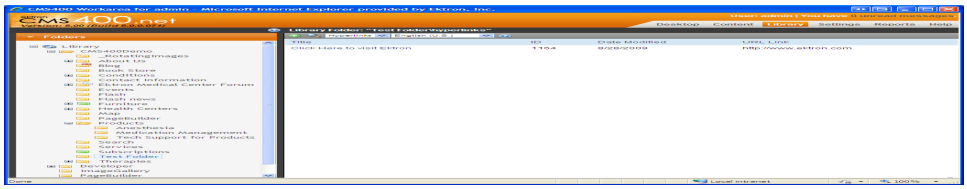
2. Click the **Delete** button ( ).
3. If you want to remove the file from the CMS server, check the **Remove from the server box**, then click the **Delete** button again. If you only want to remove the image from the folder, leave the box unchecked and click the **Delete** button again.
4. Click **OK** in the popup message box to delete the image.

Exercise 10-6: Adding a Hyperlink

1. In the Library tab, choose the **Test Folder**.
2. From the drop down list, select **Hyperlinks**.
3. Click the **Add** button ( ).



4. Enter a title for the hyperlink, which will become the link text. (Example: "Click here to visit Ektron").
5. Enter the URL for the link. (Example: http://www.ektron.com)
6. Add a Description.
7. Click the **Save** button ( ). The hyperlink is added to the Library.

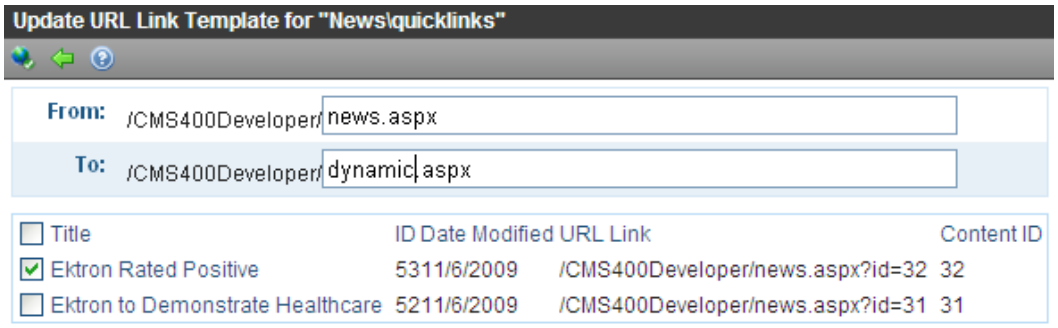


Exercise 10-7: Updating QuickLinks

There may be instances where templates will be changed for a given folder, for example the look and feel or layout may have changed. In this instance a new template may be created to replace the old one. The new template may be added to a folder but the individual contents that used the old template will still reference the old template and must have it's Quicklink updated to display properly. The following exercise will show the steps to accomplish the Quicklink update.

1. Go to the Ektron Medical homepage.
2. From the **Latest News** section on the bottom right of the homepage, select the **Ektron Rated Positive** content.
3. Observe the URL and it should be: http://localhost/CMS400Developer/news.aspx?id=32
4. Open the Workarea.
5. In the Library tab, choose **CMS400Demo > About Us > News** folder.
6. From the drop down list select **QuickLink**.

7. Click on the **Update QuickLink** button ( ).

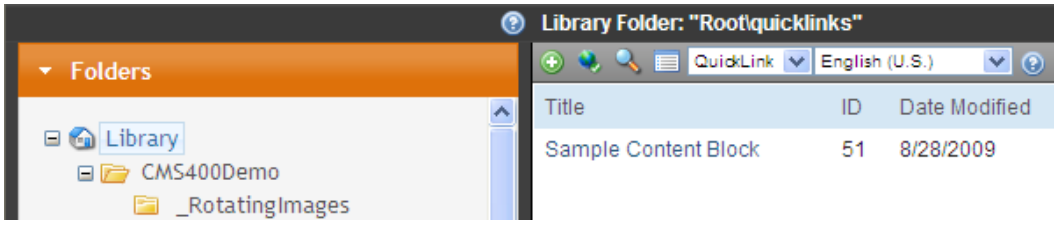

Update URL Link Template for "News\quicklinks"
From: /CMS400Developer/ news.aspx
To: /CMS400Developer/ dynamic.aspx
Title ID Date Modified URL Link Content ID
Ektron Rated Positive 5311/6/2009 /CMS400Developer/news.aspx?id=32 32
Ektron to Demonstrate Healthcare 5211/6/2009 /CMS400Developer/news.aspx?id=31 31

8. Change news.aspx to dynamic.aspx in the "To" field.
9. Select **Ektron Rated Positive** QuickLink.
10. Click on the **Update QuickLink** ( ) button to replace news.aspx template with dynamic.aspx template.
11. Go to the Ektron Medical homepage.
12. From the "Latest News" section on the bottom right of the homepage, select the **Ektron Rated Positive** content.
13. Observe the URL and it will have changed to: http://localhost/CMS400Developer/dynamic.aspx?id=32

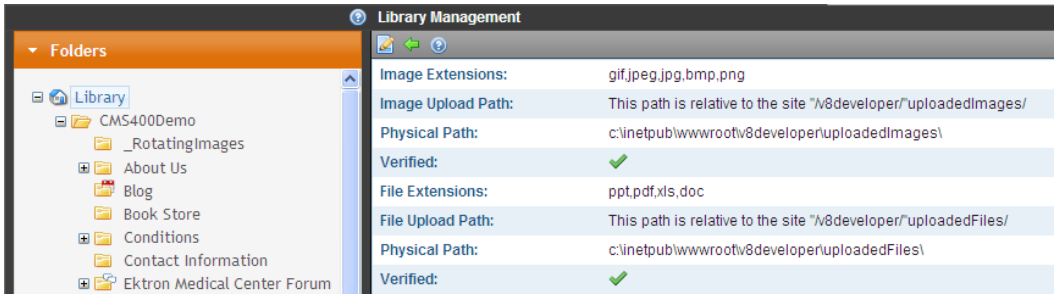
Exercise 10-8: Library Folder Properties

The library folder properties contains library-related information, including load balance settings, image and file types that are allowed to be uploaded, as well as other settings.

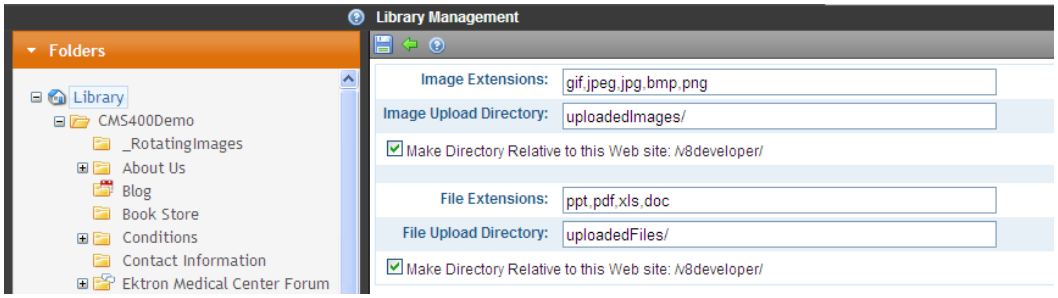
1. In the Library tab, choose the **Library** (Root) folder.



2. Click on the Library **View Properties** button. ( )



3. Click on the **Edit** ( ) button.



4. You can now change the image and file types that will be allowed to be uploaded into the Library.

Unit 11 – Adding & Creating DMS Content

Reference: "Content" chapter in *Ektron CMS400.NET Reference Manual.*

CMS400 stores DMS assets according to the configurations in the AssetManagement.config file.

An administrator can change these settings by going to the **Settings Tab > Configuration > Asset Server Setup**.

Asset Management Configuration
Tag
Value
Description
DomainName
bashful.ektron.com
AppDomain under which CMS is running ex: www.ektron.com
FileTypes
.txt,.doc,*.xls,*.ppt,*.pdf,*.gif,*.jpg,*.jpeg,*.log,*.vsd,*.dot,*.zip,*.swf,*.wma,*.wav,*.avi, *.mp3, *.mp4, *.rm, *.wmv, *.ra, *.mov, *.odb, *.odt, *.odf, *.odp, *.odg, *.ods, *.png,*.docx,*.xlsx,*.pptx, *.vsdx, *.wmf, *.xml, *.htm, *.html, *.flv, *.jeff
File types supported for upload by the CMS system
LoadBalanced
0
Is this server LoadBalanced, you need to set this in physical file
ServerName
U15246197
User domain against which you should validate
StorageLocation
d:\assetlibrary\bashfulektroncom\CMS400Developer\
Secure storage location for non published assets
WebShareDir
/dmdata/\
Temporary directory name where assets are placed during content update

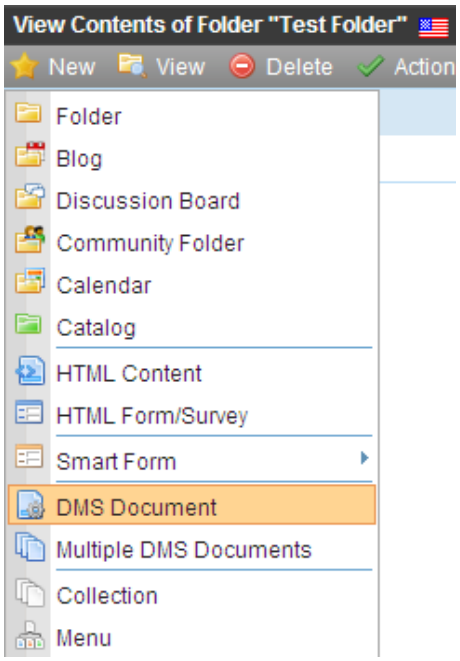
To modify an Asset Management Configuration Tag

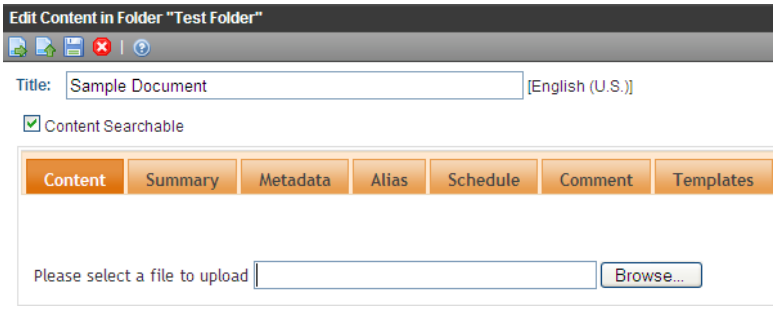
1. Click on **Asset Server Setup**.
2. Click the **Edit** button ( ) to the left of the tag you want to edit.The Value field for that tag changes to a text box.

3. Change the information in the text box.
4. Click the **Save** button ( ).

Exercise 11-1: Adding DMS Through the Menu

1. In your Test Folder select **New > DMS Document**.
2. For the title type in Sample Document.
3. Click the **Browse** option to browse to a document or image on your desktop.
4. Put in information in the other tabs such as summary and metadata.
5. Then **Publish** this document.
6. You will see Sample Document as a piece of content in your Test folder.

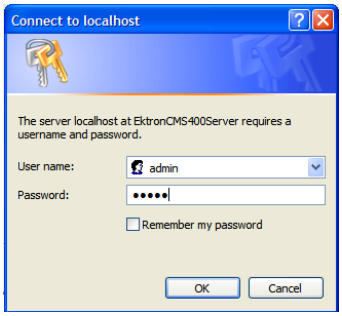




Exercise 11-2: Mapping a Network Drive to the CMS folders

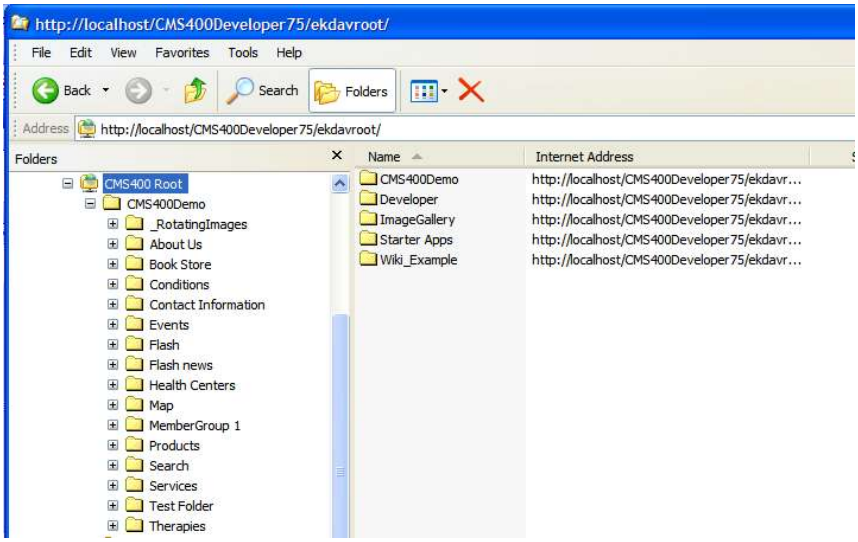
1. Open up My Computer.
2. Go to **Tools > Map Network Drive…**
3. Click on **Sign up for online storage or connect to a network server**.
4. Click **Next**.
5. Make sure that **Choose another network location** is highlighted and click **Next**.
6. Enter in this address: http://localhost/CMS400Developer/ekdavroot and click **Next**.

7. Login using your CMS credentials.



Note: If you check the **Remember my password** box, the User Name and Password fields will be populated for you when you log into the mapped drive later.

8. Change the name for the network place to "CMS400 Root".
9. Click **Next**.
10. Uncheck **Open this network place when I click Finish.**
11. Click **Finish**. Wait – it may take a few moments to create the mapped network drive.
12. In your file browser, go to the new network place **CMS400 Root**.
13. Login using your CMS credentials. You can now use this standard windows functionality in conjunction with the CMS.

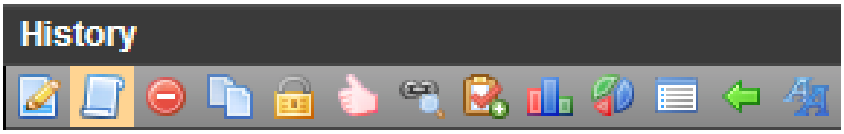


Unit 12 – Restoring Content from its History

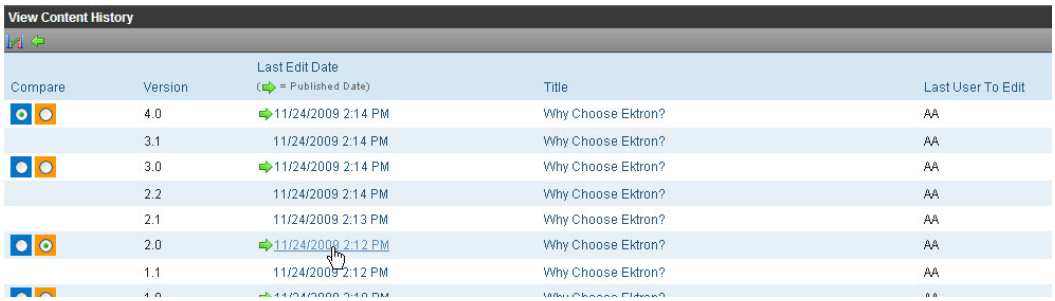
Reference: "Content" chapter in *Ektron CMS400.NET Reference Manual.*

A complete history is maintained for content in the CMS. You can view older versions, compare the current published version with older versions and restore versions of content as desired.

Exercise 12-1: Restoring in the Workarea



1. In the Workarea, navigate to the **CMS400Demo > About Us** folder.
2. Click on the content entitled **Why Choose Ektron** (content ID 64). (This is content that you have edited and published with changes in exercise 7-2.)
3. Click the **History** button ( ). The Content History window opens.


View Content History
Compare
Version
Last Edit Date
(= Published Date)
Title
Last User To Edit
4.0 11/24/2009 2:14 PM Why Choose Ektron? AA
3.1 11/24/2009 2:14 PM Why Choose Ektron? AA
3.0 11/24/2009 2:14 PM Why Choose Ektron? AA
2.2 11/24/2009 2:14 PM Why Choose Ektron? AA
2.1 11/24/2009 2:13 PM Why Choose Ektron? AA
2.0 11/24/2009 2:12 PM Why Choose Ektron? AA
1.1 11/24/2009 2:12 PM Why Choose Ektron? AA

4. Select a version to view the differences between the most recent version and an earlier version. The whole number indicates a published version while a decimal number indicate any content that has been checked in.

Note: The compare radio buttons are for comparing the analytics between versions.

5. Click the **View Diff** ( ) button to view the differences between the live version and that historical version. When finished, close this window.
6. Restore the selected historical version by clicking on the **Restore** button ( ). The Content History window will close and you will return to the Workarea window.

Note: The content is in a "Staged" state – that is, it is "Checked In" but not published.

7. Click the **View Stage** button ( ) to see the historical version you've restored.
8. To make the restored version appear on your web page, click the **Edit** button ( ), make any changes you like, then publish the changes.

Exercise 12-2: Restoring in a Web Browser

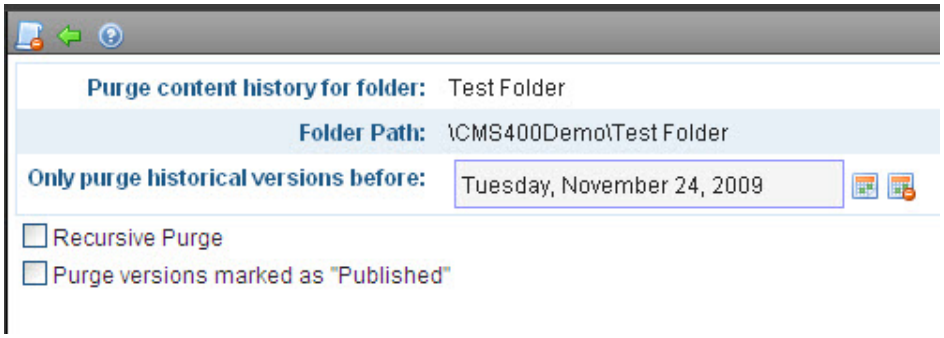
1. In a browser, navigate to the About Us > Why Choose Ektron Medical.
2. Scroll over the silver access point and select View History from the menu.

3. Follow steps from the previous exercise: *Restoring in the Workarea* on previous page.

Exercise 12-3: Purging the History

Note to instructor: Fresh installs of CMS400 Developer sites do not have content history as they are purged before shipping the product.

1. Click on the **Test Folder**.
2. Choose menu **View > Folder Properties**.
3. Click on the **Purge History** button on the tool bar. ( )
4. Set the today's date to purge. Uncheck the options for Recursive Purge or Purge versions marked as published, as shown below:


Purge content history for folder: Test Folder
Folder Path: \CMS400Demo\Test Folder
Only purge historical versions before: Tuesday, November 24, 2009
Recursive Purge
Purge versions marked as "Published"

5. Click on the **Purge History** button to start the purge process ( ).

When the purge is complete, only the published versions of the content will be left in the history. If you want to remove all older versions of content, check the Purge versions marked as published box before purging.

Unit 13 – Copying / Moving Content

Reference: "Content" chapter in *Ektron CMS400.NET Reference Manual.*

Users can copy or move content from one folder to another folder, but they cannot copy or move an entire folder.

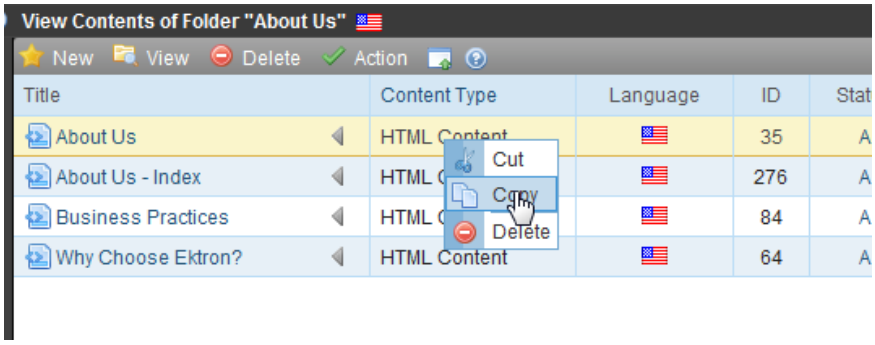
Note: To achieve something like moving a folder, a user must create a new folder with the same settings as the original one, then move all the content from the original folder to the new folder.

If the original folder uses a Smart Form, make sure the destination folder uses the same Smart.

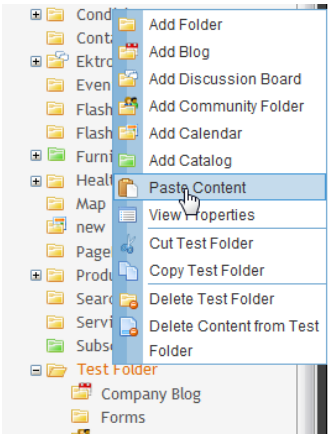
When moving content, the content's ID does not change. When copying a piece of content, the original will keep its original ID and the copy of that content will have a new ID, since they are separate content items.

Exercise 13-1: Copying Content

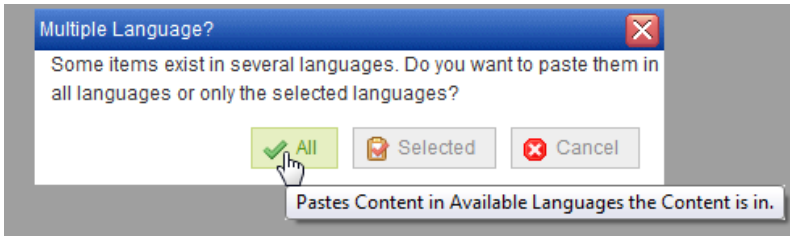
1. Navigate to the **CMS400 > About Us** folder.
2. Click on HTML Content next to the "About Us" content to highlight it.
3. Right Click and select **Copy**.



4. Browse to "**Test Folder**"
5. Right click and **Paste Content**.

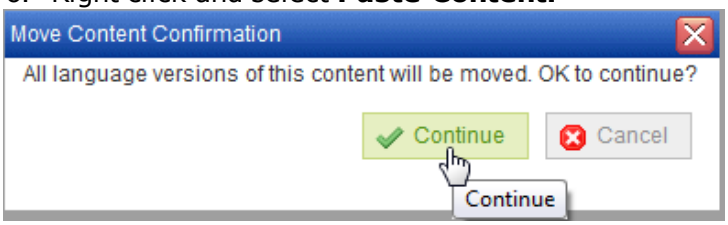


Click **ALL** to accept the change.


Multiple Language?
Some items exist in several languages. Do you want to paste them in all languages or only the selected languages?
All
Selected
Cancel
Pastes Content in Available Languages the Content is in.

Exercise 13-2: Moving Content

1. Create a new folder under **Test Folder** and call it **Test 2**.
2. Browse to the **Test Folder**.
3. Click on HTML Content next to the "About Us" content to highlight it.
4. Right Click and select **Cut**.
5. Browse to **Test 2**
6. Right click and select **Paste Content.**



7. Click **Continue** to finish moving the content.

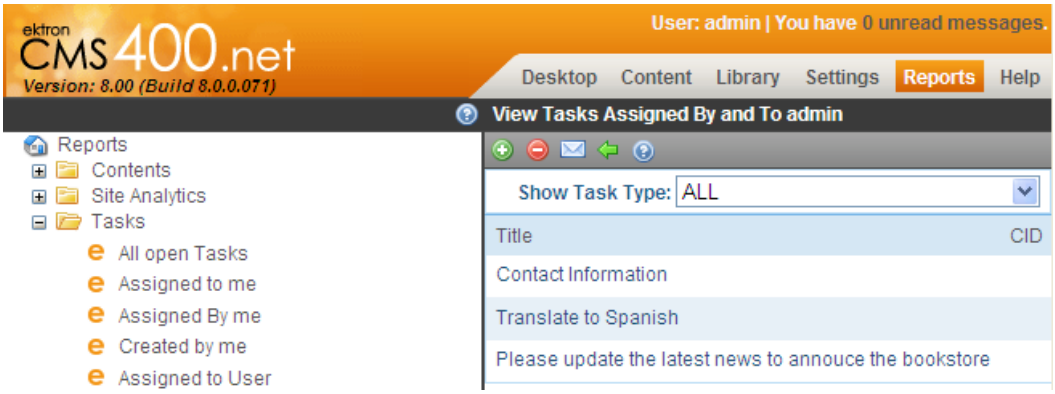
Unit 14 – Using Tasks

Reference: "Managing Tasks" chapter in *Ektron CMS400.NET Reference Manual.*

Tasks can be assigned a Task Category, then a Task Type. Task Categories and Task Types have a hierarchical relationship: the Task Category is the parent and the Task Type is the child. Several types can be assigned to each category. Some examples of Task Categories might be Engineering, Sales, Documentation or Web Design. Examples of Task Types might be Edit Content, Update Documents or Contact Customer. Task Categories and Task Types provide a way to filter tasks.

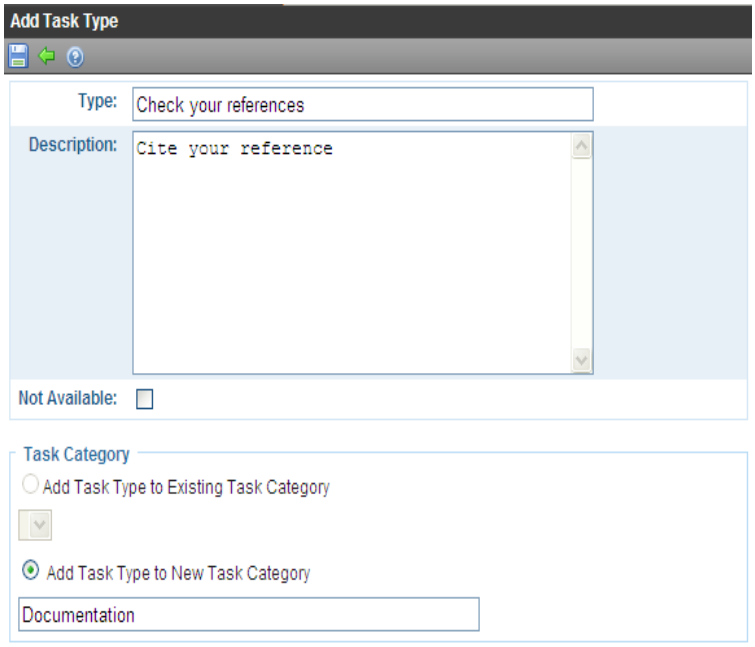
Tasks are under the reports section.

Reports > Tasks



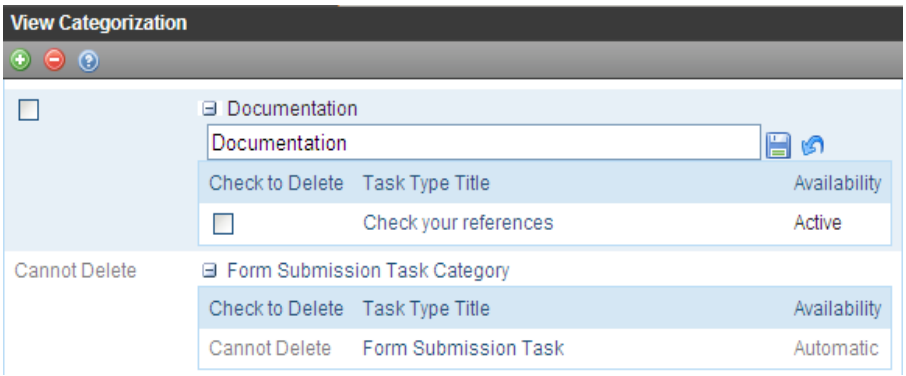
Exercise 14-1: Adding a New Task Category and Task Type

1. Select the **Settings** tab, expand **Configuration** and select **Task Types**.
2. Click the **Add Task Type** button ( ). The Add Task Type screen appears.



3. Click the **Add Task Type to New Task Category** radio button.
4. In the **New Task Category** field enter "Documentation".
5. In **Task Type** field enter "Check References".
6. In the **Task Type Description** field enter "Cite your references".
7. Uncheck **Not Available**. (unchecked is the default setting)
8. Click **Save Task Type** ( ).
9. Your new task categories and task types appear on the View Categorization screen.

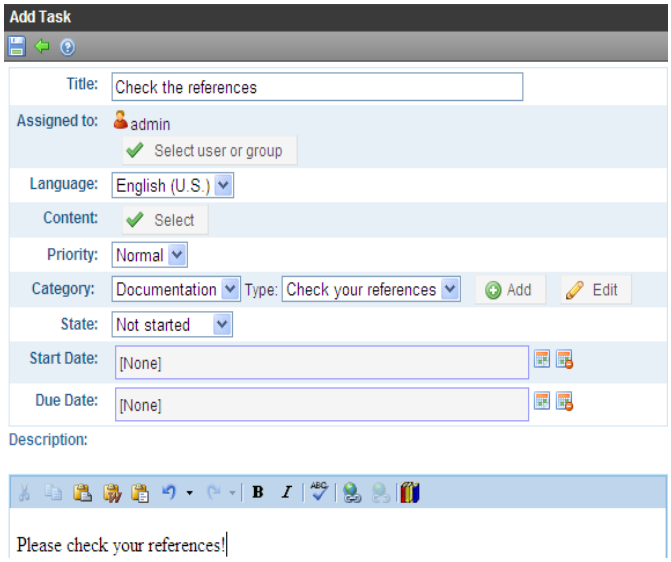
Exercise 14-2: Adding a New Task Type to an Existing Task Category



1. Click the **Add Task Type** button ( ). The Add Task Type screen appears.
2. Click the **Add Task Type to Existing Task Category** radio button or click the drop down box.
3. Choose a category from the drop down box such as "Documentation".
4. Add a task type name in the **Task Type** field such as "Check grammar".
5. Enter a **Task Type Description** like "check grammar according to style guide".
6. Uncheck **Not Available**.
7. Click **Save Task Type** ( ).
8. Your new task categories and task types appear on the View Categorization screen.

Exercise 14-3: Creating Tasks for a Content Item

1. In the Workarea, click on the **Content** tab.
2. Select the **Test Folder**.
3. Open a piece of content.
4. Click the **Add Task** button ( ). The Add Task page appears.



5. Enter a title for the task.
6. Assign the task to someone by clicking on the **Select User or Group** link.

   Note: By default, the task is assigned to you.
7. Set the **Priority** to **High**.
8. Select the **Task Category & Task Type**. If the Category & Type are not in the list, click Add to add a new Category and/or Type like "Documentation" and "Check References".
9. Set the **Start Date** and **Due Date**, if needed.
10. Enter a **Description** of the task.
11. Click the **Save** button ( ).

Exercise 14-4: Creating General Tasks

1. In the tabs section, click on Reports and select "Assigned by and to me in the left side navigation tree. The Tasks report list will be displayed.
2. Click the **Add** button ( ) to create a new task.
3. The Task creation process will be the same as above exercise. The only differences are you can select Language and Content here.
4. Click the **Save** button ( ).The new task will appear in the View Tasks list.

Exercise 14-5: Adding Comment & Changing State on a Task

In the Workarea, click the **Reports Tab**.

Select **Reports > Tasks > Assigned by and to me**.

A list of tasks appears.

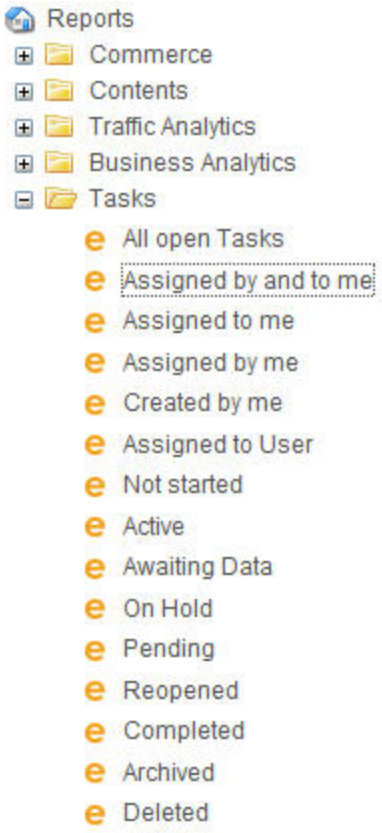
Click the title of any task.

Click the Add Comment button ( ) and enter the text for the comment.

Click on Insert to add the comment to the task.

Click the Edit button ( ) to change the settings for the task, such as the State, or to re-assign it to someone else.

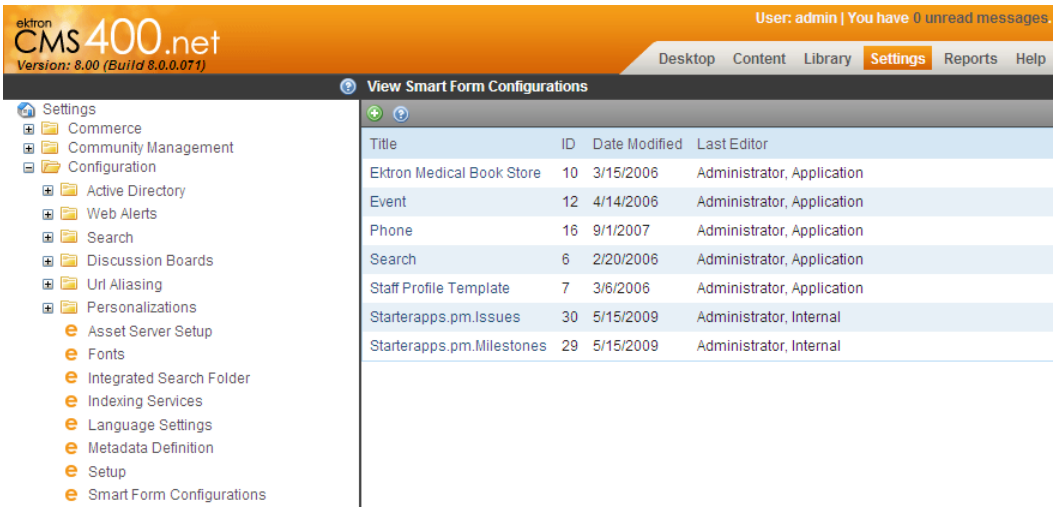
Click the Update button ( ) when finished editing.



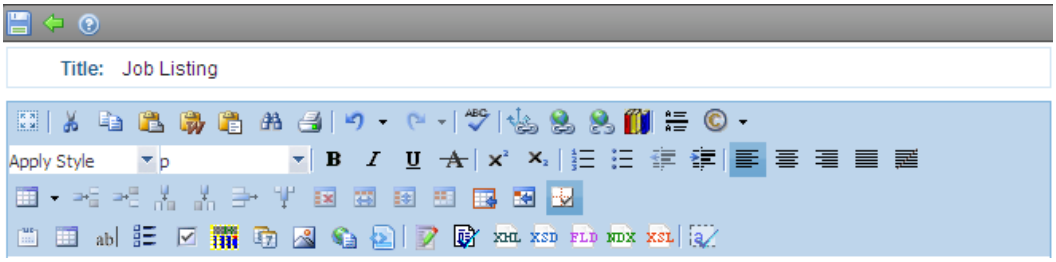
Unit 15 – Creating and Assigning a Smart Form

Reference: "Smart Forms" chapter in *Ektron CMS400.NET Reference Manual.*

Smart Forms (XML Content) provide a method for creating structured data. This is useful for custom programming or if you need more control over the display of content. Like metadata definitions, smart forms must be assigned to folders to make them available. [For more information about Smart Forms, please refer to the Admin Manual – Managing XML Content.] content designer.



Exercise 15-1: Creating a Smart Form



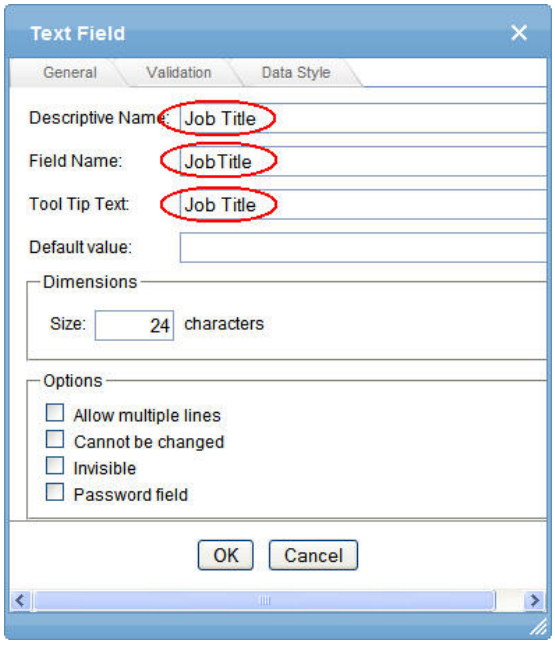
1. In the Workarea, click the **Settings** tab,
2. Expand **Configuration**.
3. Click on **Smart Form Configuration**.
4. Click the **Add Smart Form** button ( ) to create a new smart form.
5. For the Title of the Smart Form, enter "Job Listing".
6. Click the **Save** button ( ).

Exercise 15-2: Using a Plain Text Field

1. In the design area, type "Job Title: "

   Note: There is a space after the colon.

2. Add a **Plain Text Field** (ab) to the right of the text. The Plain Text Field properties window pops up.
3. Enter the information circled in red in the following picture:

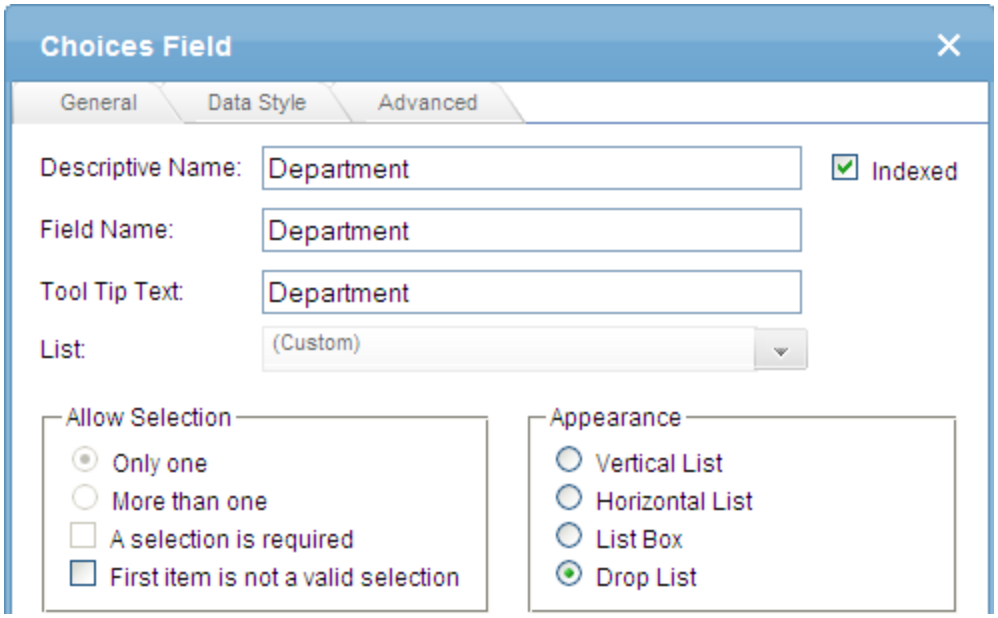


4. Click **OK**.
5. Click to the right of the Plain Text Field and press <Enter> to create a new line.

Exercise 15-3: Using a Choices Field

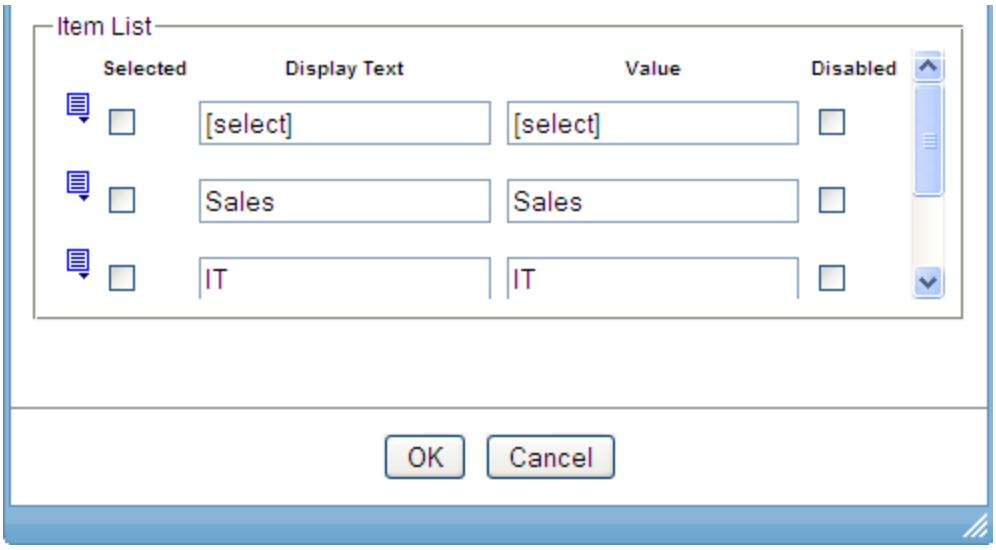
1. Type "Department: " on the new line.
2. Add a **Choices field** ( ) to the right of Department. The properties window pops up.

3. Enter the following information:



4. Creating a list of selections. The Content Editor will be able to select from this list when entering data into the Smart Form.
    a. Type "[Select]" in the **Text** box.
    b. Click **Add**. "[Select]" will be added to the Item List on the left side.
    c. In the **Text** box, highlight "[Select]" and type "Sales", then click **Add**.
    d. Repeat the process to add more departments as shown below.
    e. Check the box next to **First item is not a valid selection**.
    f. Check the box to the left of "[Select]" to make it the default selection.
    If you don't check an item, the first one in the list will become the default.

    The result will look something like this:

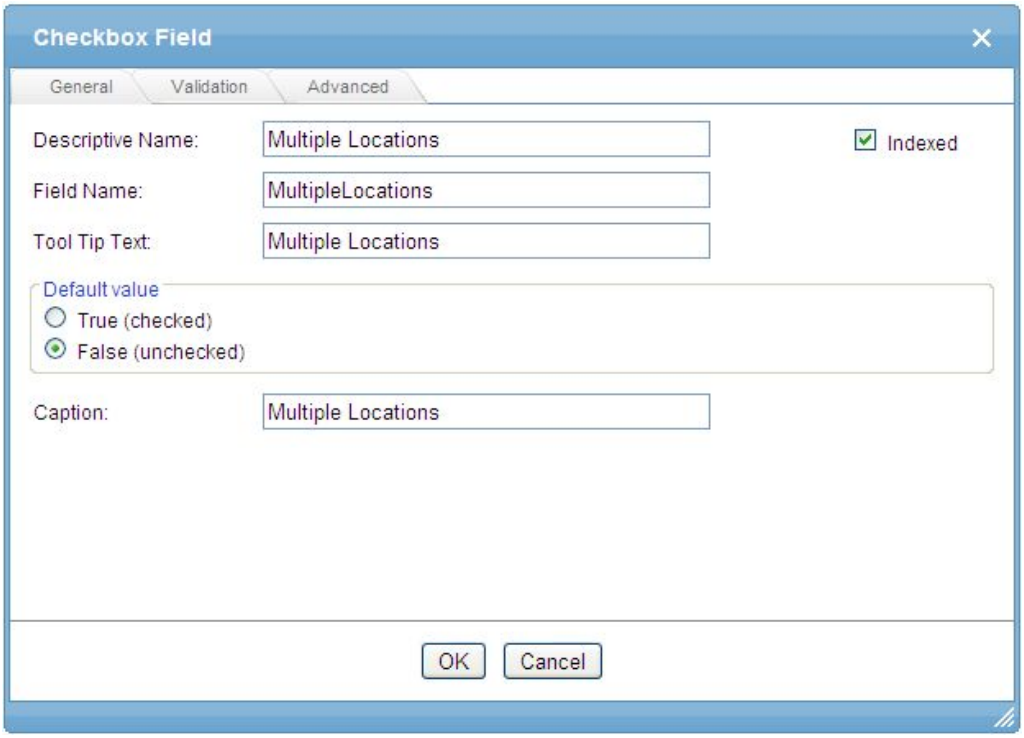


The order of the items in the list can be changed by highlighting an item and using the **Move Up** and **Move Down** buttons. Items can be removed using the **Remove** button.

g. Click **OK**.

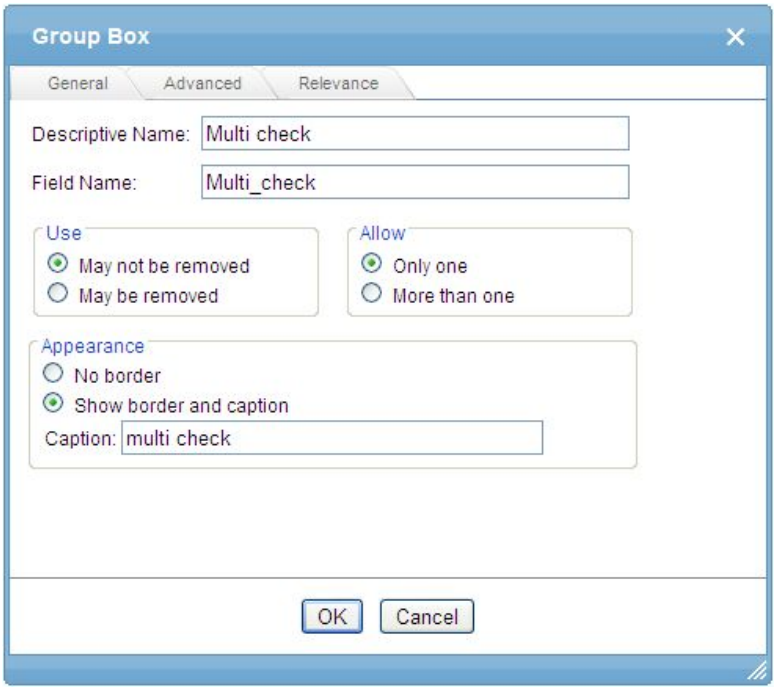
Exercise 15-4: Using a Check Box

1. Create a new line and type "Multiple Locations: "
2. Select the Check Box ( ) to the right of "Multiple Locations:".
3. Enter the following information and click OK.

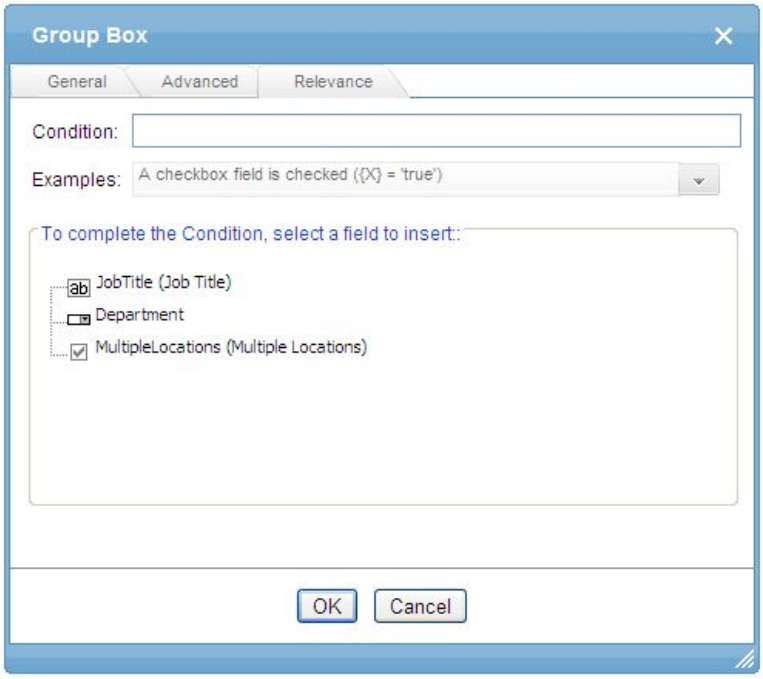


Exercise 15-5: Using Relevance

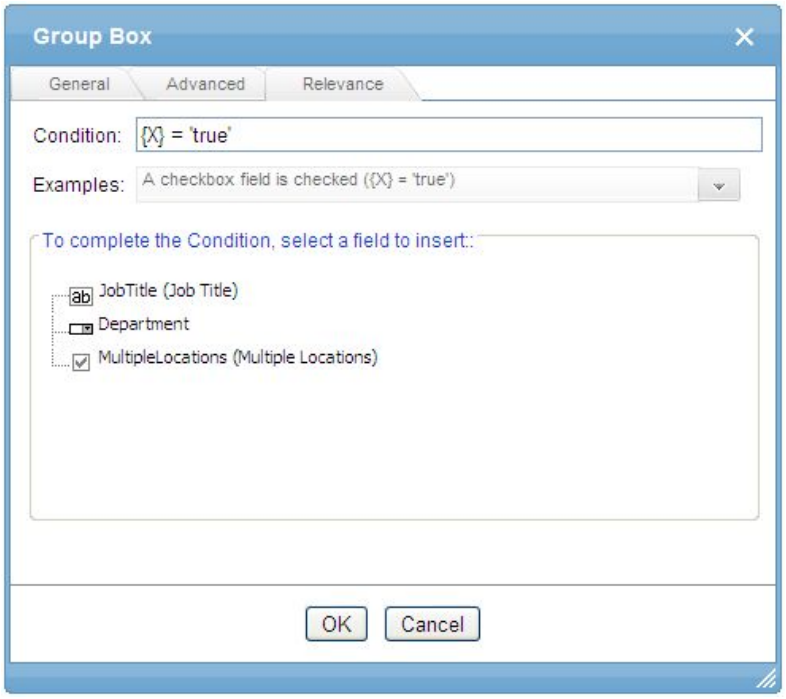
1. Create a new line and click the **Group box** icon ( )
2. Type "Multi Check" in the descriptive name, field name and Caption.



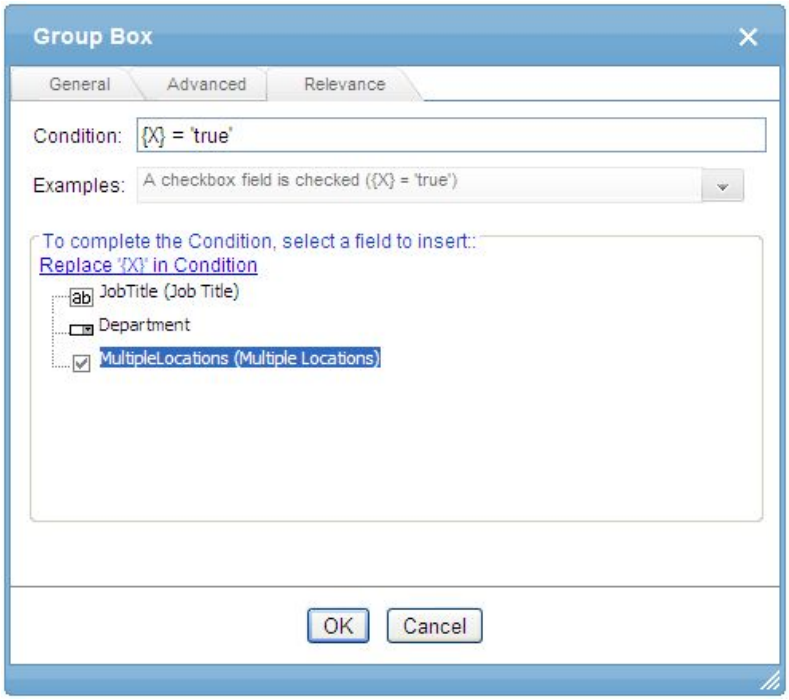
3. Select the **Relevance** tab.



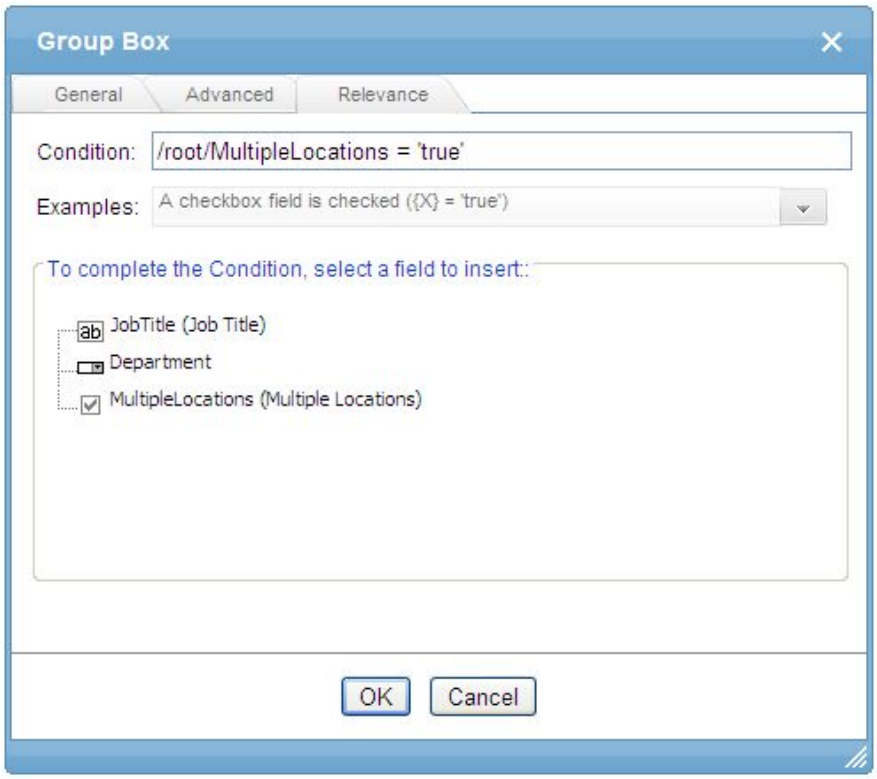
4. Select from the example dropdown: " A checkbox field is checked ({x} = true)



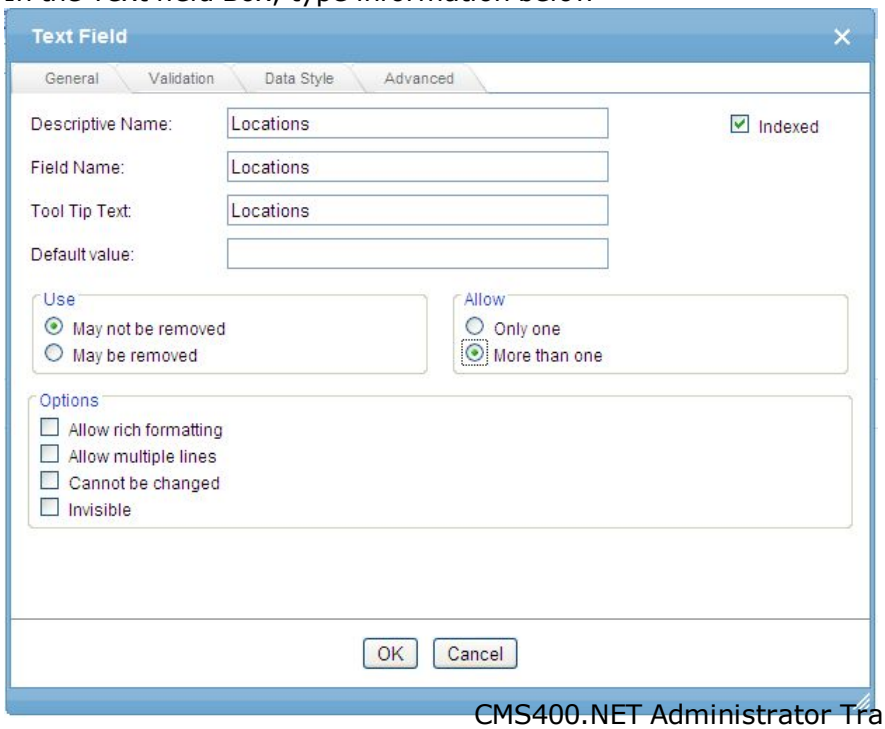
5. Click the cursor in front of "{x}='true'" and then select **MultipleLocations** (Multiple Locations)



6. Double click on **Multiple Locations (Multiple Locations)**.



7. The Condition should read "/root/MultipleLocations = 'true'".
8. Select **OK**.
9. Insert your cursor inside the group box you just created called "Multi Check."
10. Inside the group box, type in the word "Location:" and insert a new text field.
11. In the Text field Box, type information below

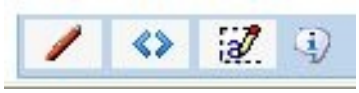


12. Select **More than one** underneath the allow box
13. Click **OK**.

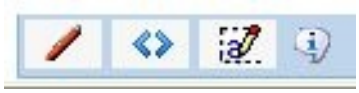
Exercise 15-6: Relevance Check

Once you have successfully created your relevance, you can check to make sure it is working properly by using the view data entry checker to check the smart form functionality.

1. Select the icon called "view data entry". This option will simulate the function of the smart-form.



2. Select the check box "multiple locations". This should make the group box "multi check" to appear.

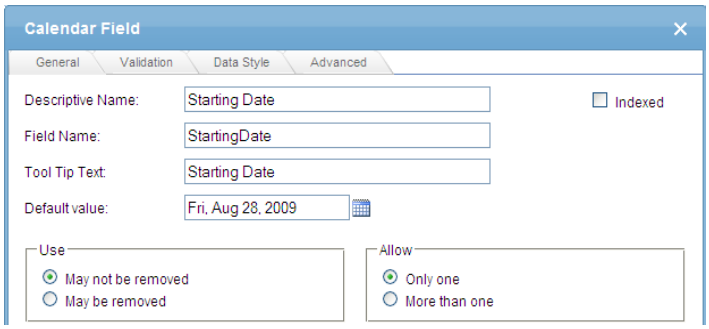


3. Select the first icon to go back to design view.

Exercise 15-7: Using a Calendar Field

1. Create a new line and type "Starting Date: "
2. Select the Calendar Field ( ) to the right of **Starting Date:**.
3. Enter the following information and click OK.

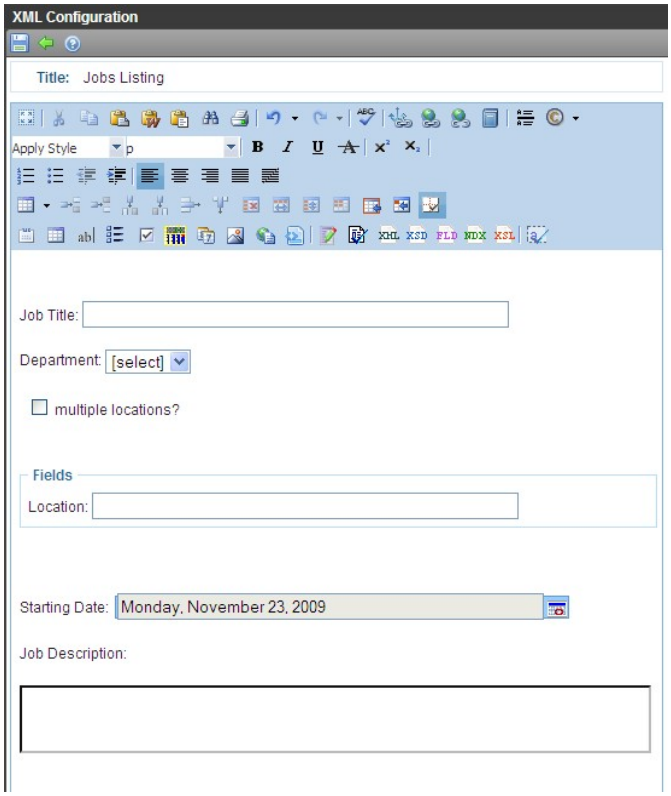
Note: This field is not indexed.



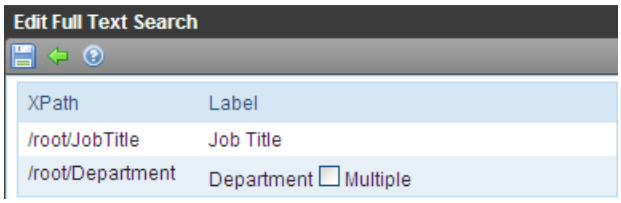
Exercise 15-8: Using a Rich Area Field

1. Create a new line and type "Job Description: "
2. Add a **Text Field** ( ) below "Job Description".
3. Select the "allow rich formatting" option and the "allow multiple lines" will automatically be selected.

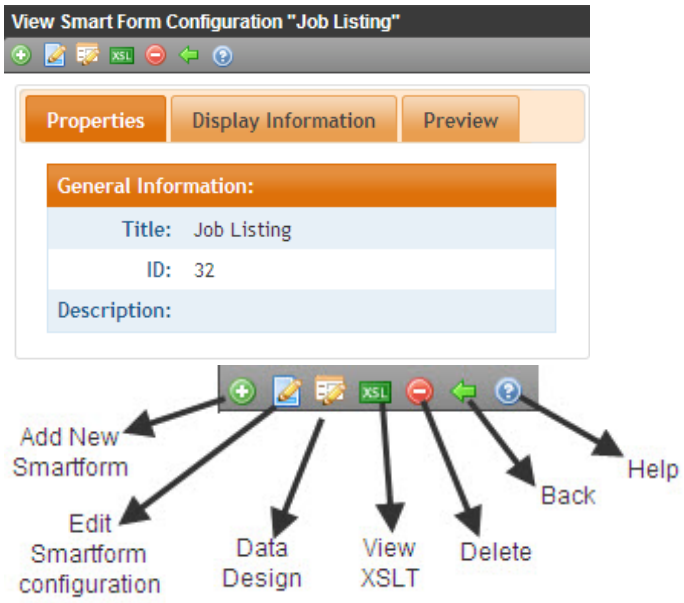
4. Check off the rich area text field The page should look like this:



5. Click the **Update** button ( ) to update the Smart Form design and save the XML configuration. The Edit Full Text Search page appears showing the XPath for the fields that have an index setting.
No settings need to be changed here.

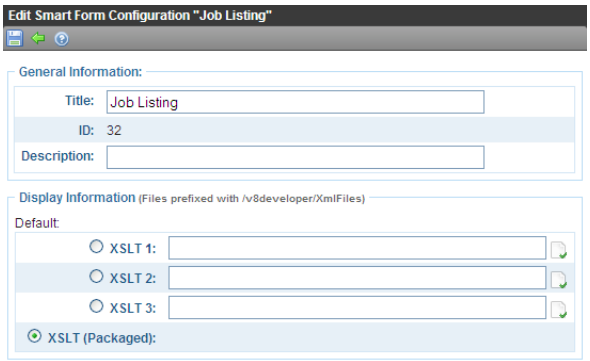


6. Click on the **Update** button ( ). The View Smart Form Configuration screen appears:

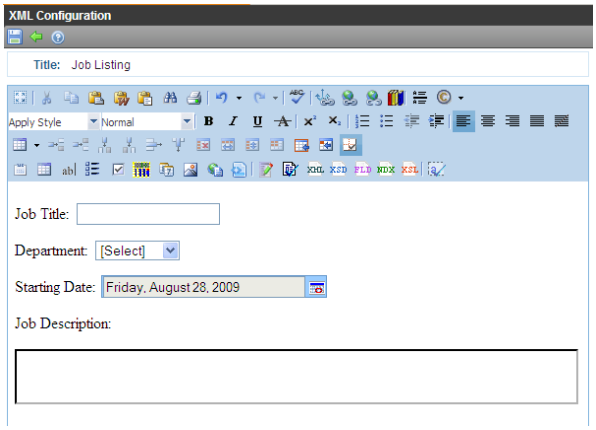


If you need to make changes later to the smart form, use the Data Design tool located on the Smart Form configuration screen shown above.

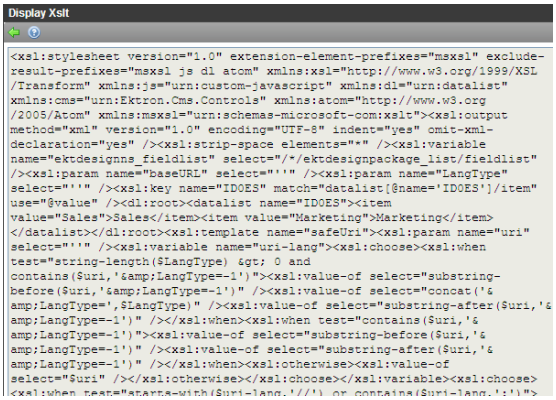
"Edit" Smart Form Configuration



"Data Design" - Edit Smart Form XML Configuration

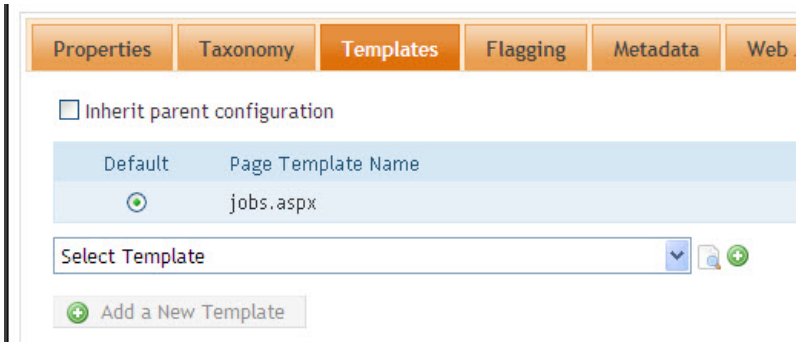


View XSLT



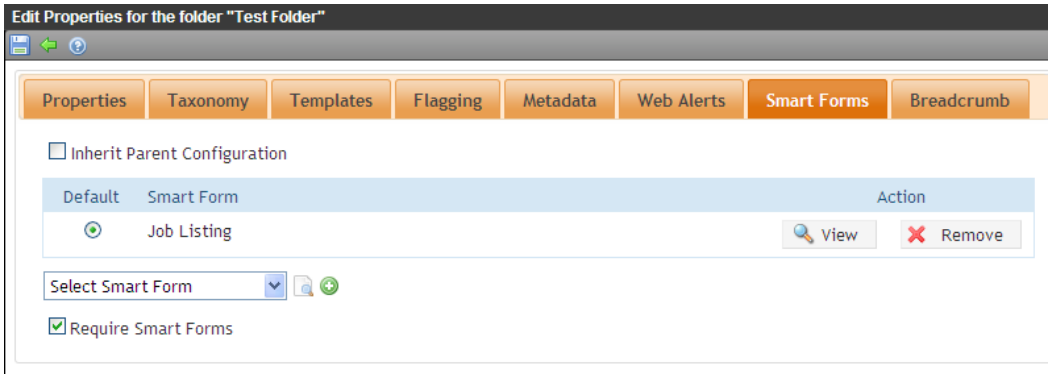
Exercise 15-9: Adding a Smart Form to the Folder Properties

1. Click the **Content** tab.
2. Select "Test Folder".
3. Within "Test Folder", create a new folder called "Jobs."
4. Remove "Inherit Parent Template" and add the default template "jobs.aspx".



5. Click on the **Smart Forms** tab.
6. Uncheck the **Inherit Parent Configuration** box and click **OK** on the popup window.
7. Remove the "Event" smart form.
8. Select "Job Listing" from the select list.
9. Click **Add**.
10. Check the **Require Smart Forms** box

11. Click the radio button next to "Job Listing".



12. Click the **Add Folder** button ( ).
13. Select the "Jobs" folder.
14. Select **New > Job** Listing.
15. Fill out the form to create a new Job Listing.
16. **Publish** or **Submit** the content. Note the **ID** number of this new Job Listing.
17. You can view this new Job Listing by entering this URL on your browser:
" http://localhost/cms400developer/jobs.aspx?id=xx " where xx is the ID number of the Job Listing you created.
(e.g., http://localhost/cms400developer/jobs.aspx?id=280)

DAY 2 OBJECTIVES

Content, Folders and Workarea review and XML content

- Review Day 1

SEO & Special Content Management

- SEO
- Metadata
- URL Aliasing

Users, Groups, Roles & Permissions

- Users and User Groups
- Special Roles
- Setting Permissions
- Approval chains

Navigation

- Learning about Search
- Taxonomy and Categorizing Content
- Folder Breadcrumbs
- Menus
- Collections
- Business Rules
- Content Rating and Reviews
- Content Flagging

Unit 16 – Creating and Assigning Metadata Definitions

Reference: "Metadata" chapter in *Ektron CMS400.NET Reference Manual.*

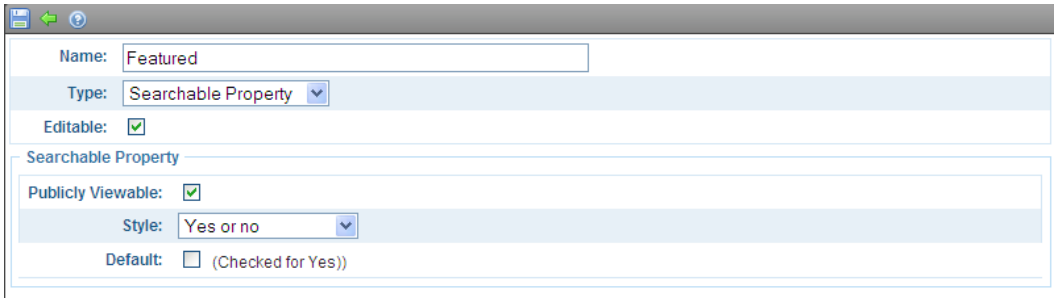
Metadata definitions determine the metadata values that are available to content on your site. Using a metadata definition involves two steps: creating the definition and assigning it to a folder.

Exercise 16-1: Creating a Metadata Definition

1. Click on the **Settings** tab in the Workarea.
2. Click on the **Configuration** folder.
3. Click on **Metadata Definitions**.
4. Click the **Add Metadata Definition** button ( ).

Name	ID	Default Text
Associated Collection	24	
ContentRelation	40	
description	20	
keywords	22	
MapAddress	108	
MapDate	162	
MapLatitude	110	
MapLongitude	112	
starterapps.pm.CMSBlog	170	No
starterapps.pm.DefaultContent	166	No
starterapps.pm.MembershipBlog	168	No
title	16	
UserRegion	38	
wellness	17	

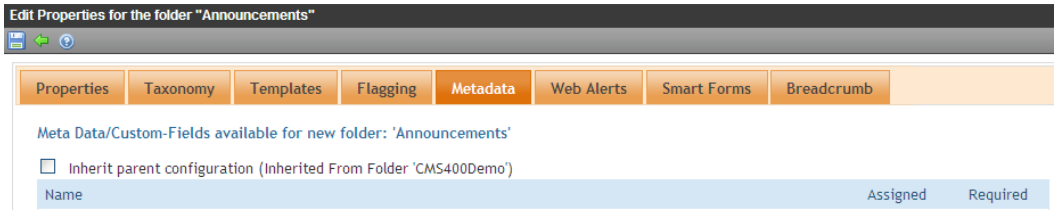
5. Name the new "Featured"
6. Set the **Type** to **Searchable Property**.
7. Set the **Style** to be **Yes** or **No**.



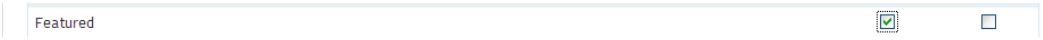
8. Leave the **Default** box unchecked.
9. Click the **Save** button ( ).

Exercise 16-2: Assigning a Metadata Definition to a Folder

1. Click the **Content** tab and select "Test Folder".
2. Create a new folder called "Announcements".
3. Click the **Metadata** tab.
4. Uncheck the **Inherit Parent Configuration** box.



5. Assign the "Featured" metadata value.



6. Click the **Update Folder** button ( ).

Exercise 16-3: Assigning a Metadata Definition to Content

1. Create a new piece of HTML content in the "Announcements" folder.
2. Click the **Metadata** tab
3. Scroll down the page until you see the **Search Data** section, then check the "Featured" box to assign it to the content.

4. Click ( ) to publish revised content.

Unit 17 – Creating a URL Alias for Content

Reference: "URL Aliasing" chapter in *Ektron CMS400.NET Reference Manual.*

Aliasing is an Ektron CMS400.NET feature that lets you create alternate addresses for your Web site's pages. By default, Ektron CMS400.NET Web pages have the following format.

You may want to change a URL to an easy to read format like:

http://www.example.com/help.aspx?id=27

to

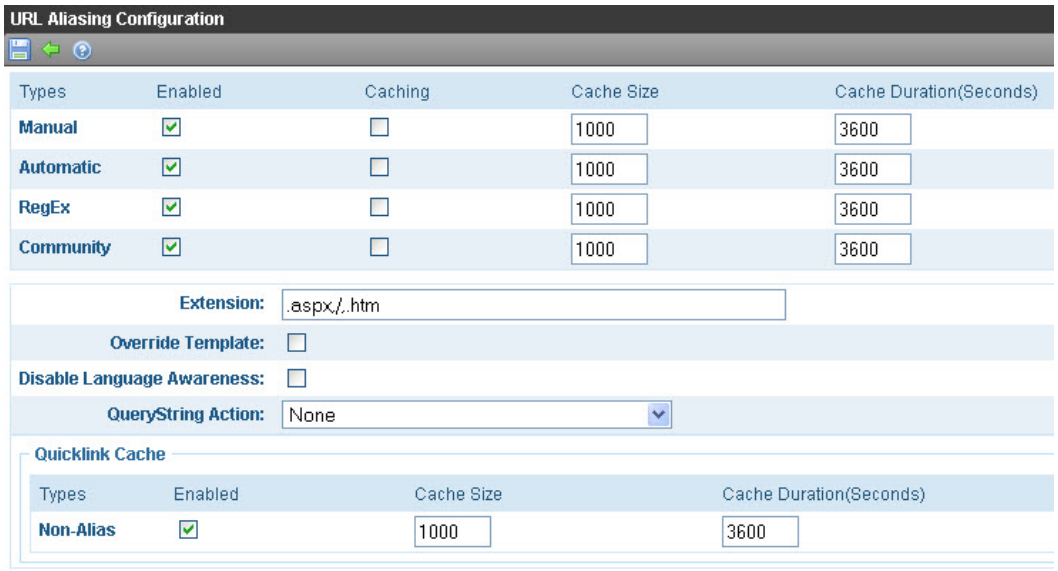
http://www.example.com/support/

or

http://www.example.com/help/technical_suppport.aspx

Exercise 17-1: Enabling URL Aliasing

1. In the Workarea, click on the **Settings** tab.
2. Next open the **Configuration > Url Aliasing > Settings** folder.
3. Click **Edit** button ( ) to configure URL Aliasing.



4. Enable **Manual**, **Automatic, RegEx** and **Community** aliasing.

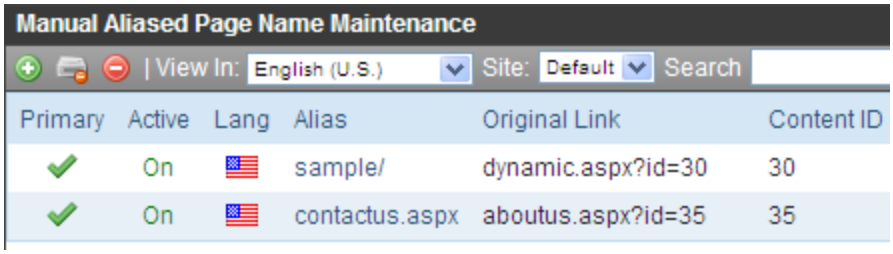
5. Add an extension ",.htm". (This will show how an aspx page can look like .htm page.)

Note: Be sure to check on restrictions to extensions in the documentation for IIS 7 and non-aspx file types.

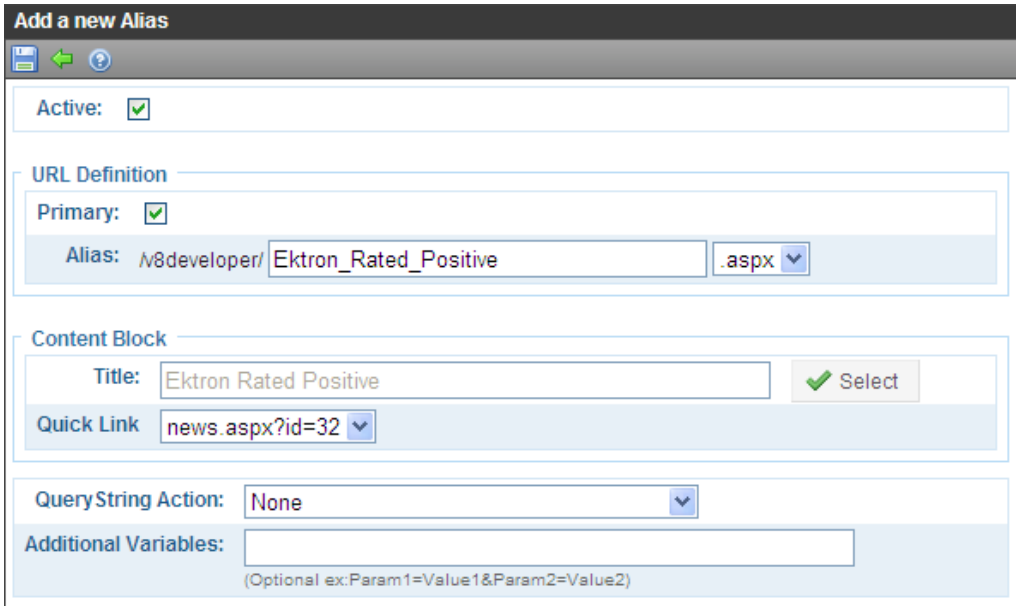
6. When finished, click the **Save** button ( ).

Exercise 17-2: Configuring Manual URL Aliasing

1. Click on the **Configuration > Url Aliasing > Manual**.



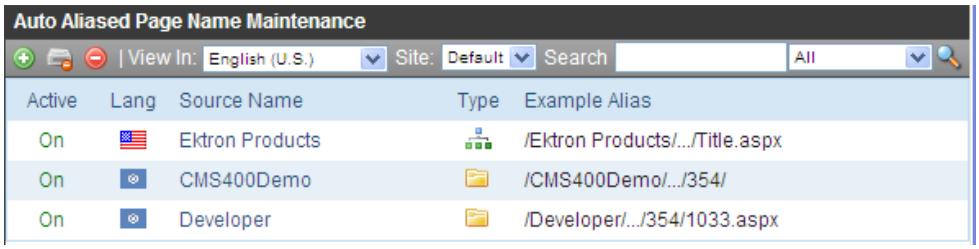
2. Click on the **Add** button ( ).to add a new manual alias.
3. Be sure **Active** and **Primary** are checked.
4. Enter the alias as "Ektron_Rated_Positive."



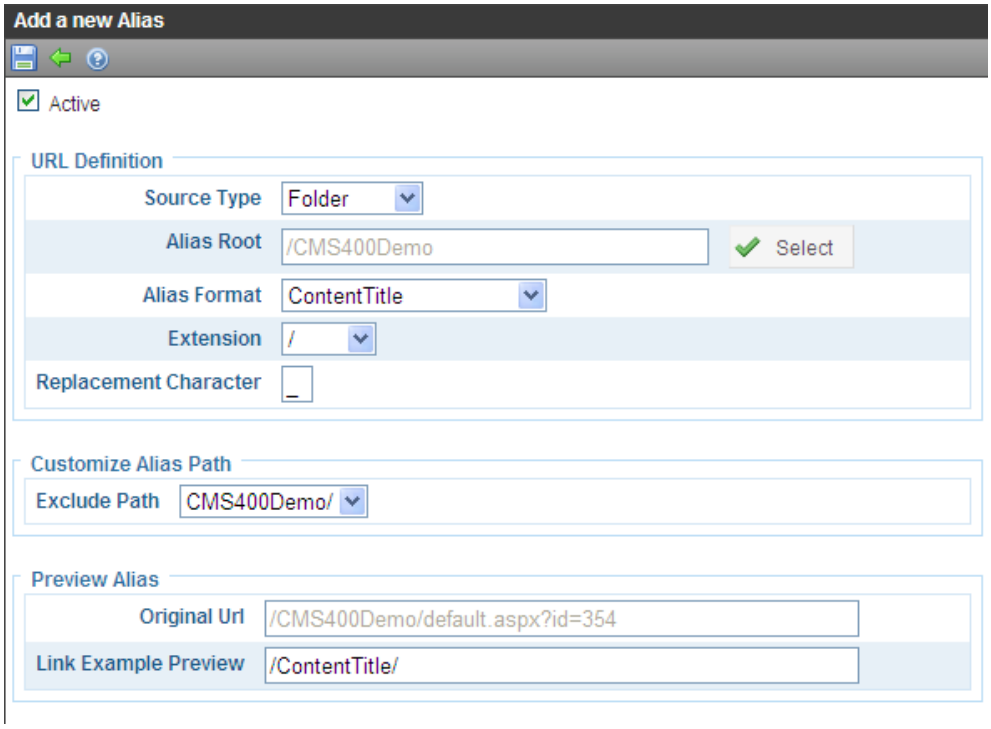
5. Click the link **Select A Content Block** and choose "**Ektron Rated Positive**" content from the folder **\CMS400Demo\About Us\News**. Notice the QuickLink is updated automatically to show "news.aspx?id=32".
6. Click the **Save** button( ).
7. See the new page on your browser by entering the URL http://localhost/cms400Developer/Ektron_Rated_Positive.aspx.

Exercise 17-3: Configuring Automatic URL Aliasing (Folder type)

1. Click on the Configuration->Url Aliasing->Automatic.



2. Click on the Add button ( ).to add a new automatic alias.
3. Be sure "Active"" is checked.



4. Set the Source Type to "Folder".
5. Set the Alias Root to "CMS400Demo"
6. Set the Alias Format to "ContentTitle"
7. Set the Extension to "/".
8. Set the Space replacement character to "_".
9. Select the Customized Alias Path to exclude the path "CMS400Demo"
10. Click the Save button ( ).
11. See the automatic alias that has been assigned to the content by looking at the ALIAS tab of the content. Look at content "**Ektron Rated Positive**"in the folder "**CMS400Demo->About Us->News**".

12. You can browse to the page by entering the URL: http://localhost/cms400developer/About_Us/News/Ektron_Rated_Positive/

Note: Taxonomy-based Aliasing is set in a similar manner. Both can be used on the site at the same time.

Exercise 17-4: Configuring RegEx URL Aliasing

RegEx expressions allow site visitors to enter a human-readable URL into the browser address field and transform that entry into the query string component of an Ektron CMS400.NET page. The benefit is that the site visitor can "guess" other pages based on an easily recognizable pattern.

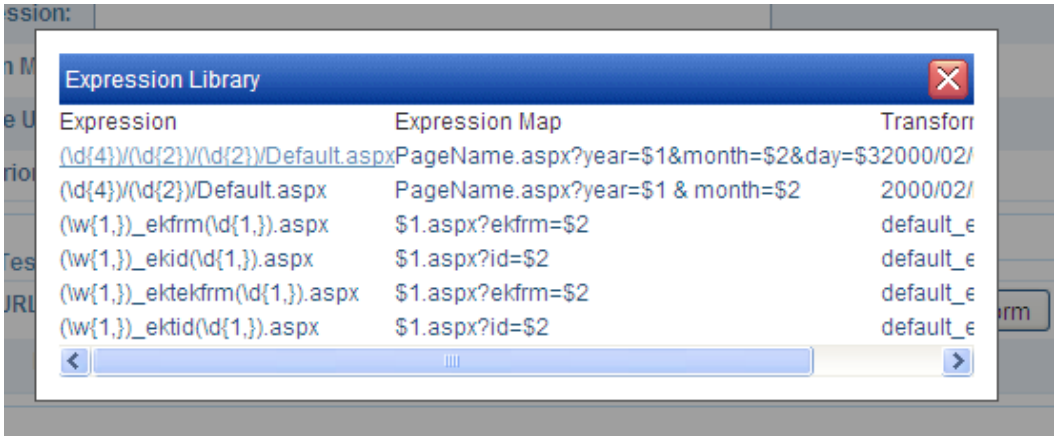
The objective of this exercise is to take a URL that looks like this:

http://localhost/cms400dev765/blogs.aspx?blogmonth=3&blogyear=2006&blogday=13&blogid=41

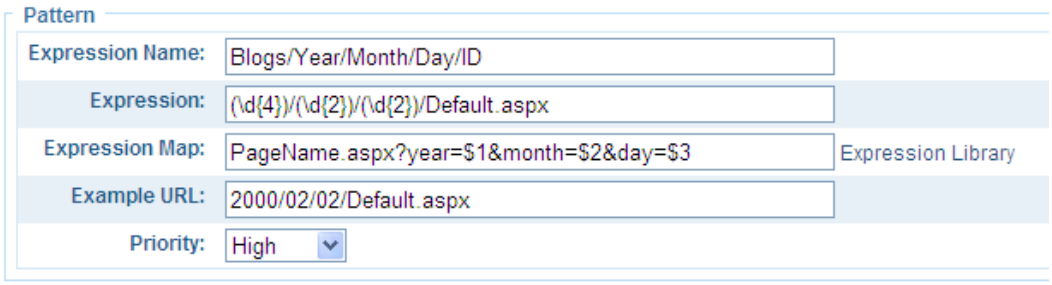
and transform it to look like this:

http://localhost/cms400dev765/blogs/2006/03/13/41/

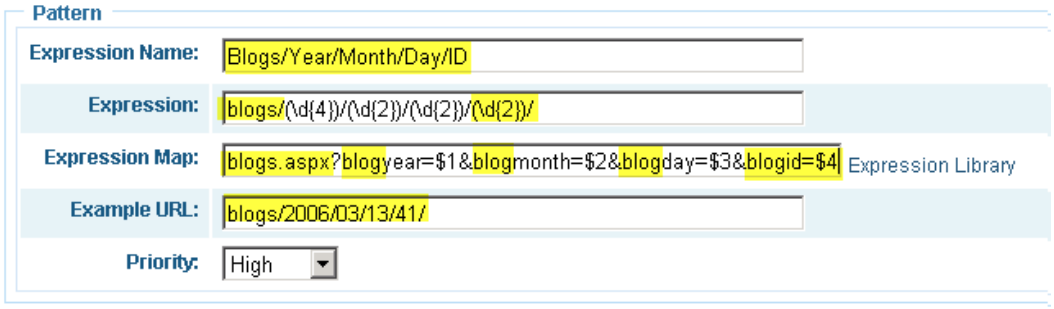
1. In the Workarea, click on the **Settings > Configuration > Url Aliasing > Regex**.
2. Click on the **Add a Regular Expression** button ( ).
3. Enter a name of Blogs/Year/Month/Day/ID. (The name will help you understand how this alias works.)
4. Click on **Expression Library** to open a list of preconfigured Regular Expressions.
5. Choose the first RegEx in the Expression Library (It is the closest option to apply to the pattern we want.)



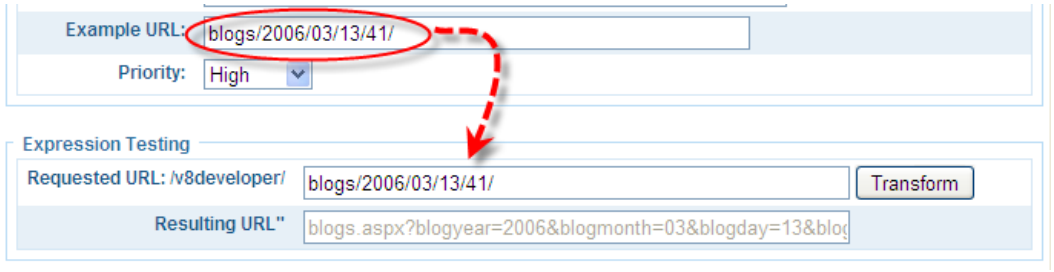
6. The Expression text field and Expression map field are automatically populated with the expression.



7. Make the following modifications so the expression and expression map look like this:

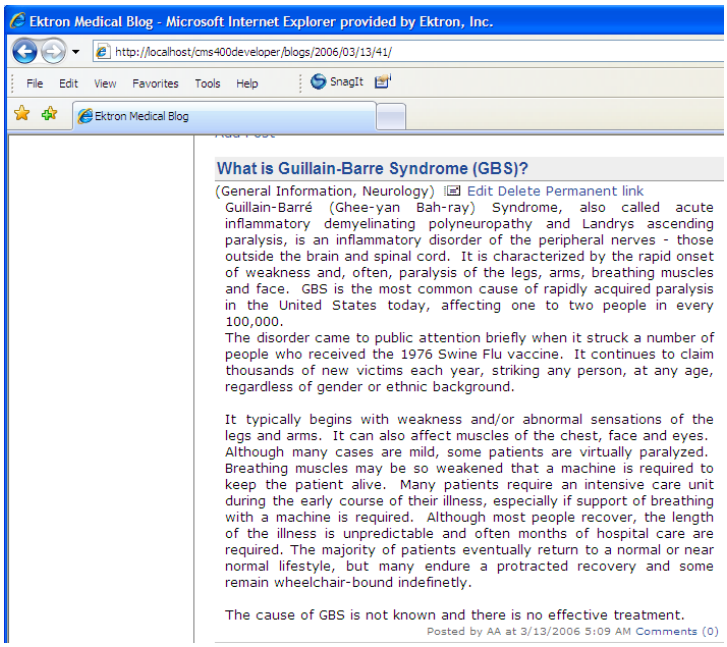


8. Test this expression by copying from the "Example URL" into the Expression Testing "Requested URL:" text box and click on the "Transform" button.



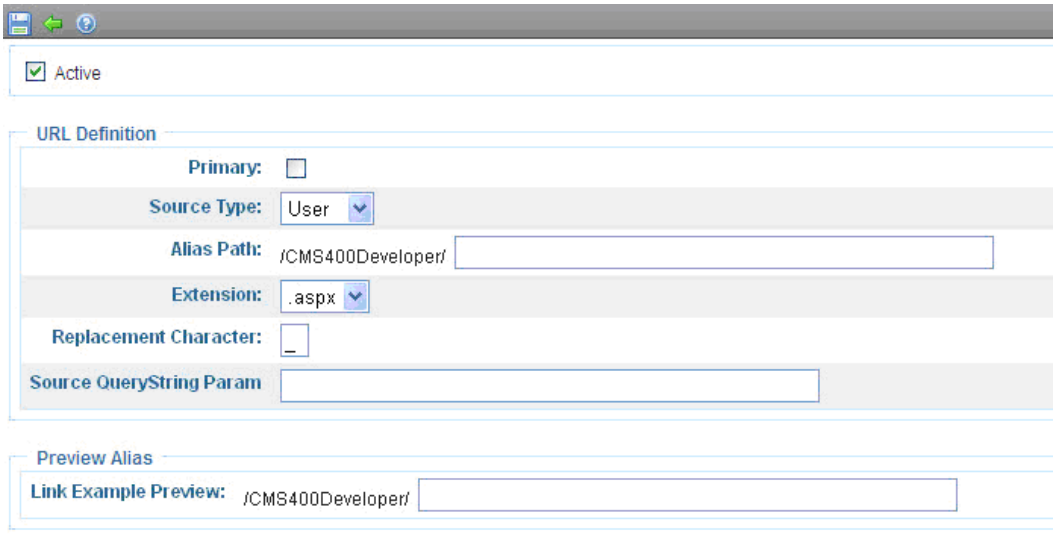
If the Requesting URL solution (in gray) looks correct, then the expression will work.

9. Click the Save button to save the new Reg Ex URL.
10. To see the results, go to a browser and enter the URL: http://localhost/cms400developer/blogs/2006/03/13/41. You will see a blog created on March 13, 2006.

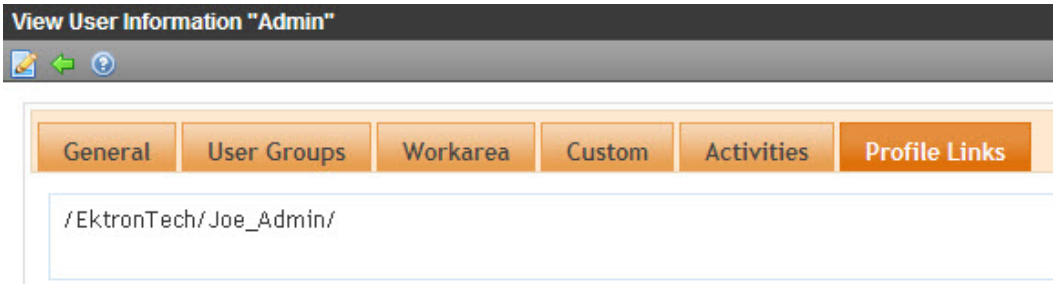

Ektron Medical Blog - Microsoft Internet Explorer provided by Ektron, Inc.
http://localhost/cms400developer/blogs/2006/03/13/41/
File Edit View Favorites Tools Help
SnagIt
Ektron Medical Blog
What is Guillain-Barre Syndrome (GBS)?
(General Information, Neurology) Edit Delete Permanent link
Guillain-Barré (Ghee-yan Bah-ray) Syndrome, also called acute inflammatory demyelinating polyneuropathy and Landrys ascending paralysis, is an inflammatory disorder of the peripheral nerves - those outside the brain and spinal cord. It is characterized by the rapid onset of weakness and, often, paralysis of the legs, arms, breathing muscles and face. GBS is the most common cause of rapidly acquired paralysis in the United States today, affecting one to two people in every 100,000.
The disorder came to public attention briefly when it struck a number of people who received the 1976 Swine Flu vaccine. It continues to claim thousands of new victims each year, striking any person, at any age, regardless of gender or ethnic background.
It typically begins with weakness and/or abnormal sensations of the legs and arms. It can also affect muscles of the chest, face and eyes. Although many cases are mild, some patients are virtually paralyzed. Breathing muscles may be so weakened that a machine is required to keep the patient alive. Many patients require an intensive care unit during the early course of their illness, especially if support of breathing with a machine is required. Although most people recover, the length of the illness is unpredictable and often months of hospital care are required. The majority of patients eventually return to a normal or near normal lifestyle, but many endure a protracted recovery and some remain wheelchair-bound indefinetly.
The cause of GBS is not known and there is no effective treatment.
Posted by AA at 3/13/2006 5:09 AM Comments (0)

Exercise 17-5: Configuring Community URL Aliasing

1. In the Workarea, Click **Settings->Configuration->Url Aliasing->Community**
2. Click **Add** a new alias button ( ).
3. Be sure "**Active**" is checked.



4. Set the **Source Type** to "User".
5. Leave the **Alias Path** blank
6. Set the **Extension** to "/".
7. Set the **Space replacement character** to "_".
8. Click **Save** ( ).
9. Navigate to **Settings>Users>Admin**.
10. Select the **Profile Links** tab to see the user alias you created.



Unit 18 – Users, Groups and Roles

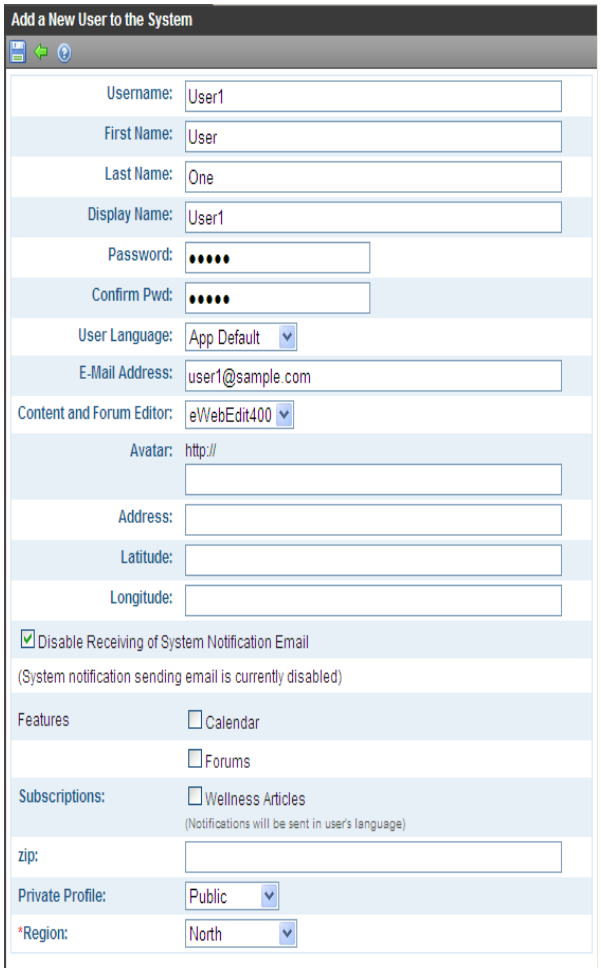
Reference: "Managing Users and User Groups" chapter in *Ektron CMS400.NET Reference Manual.*

Ektron CMS has a User, Groups, and Permissions model based upon Windows' user model. It can also synchronize with Active Directory.

- User Properties
  - Username
  - First Name
  - Last Name
  - Password
  - User Language
  - E-Mail Address
  - Disable E-Mail Notifications
  - User Group Memberships
- User Language
  - Application Menus and messages
  - Language SDK
- Builtin User
  - "Emergency User" in case of an Active Directory misconfiguration
  - The Password and Username should be changed.
  - Doesn't count against licensed users
  - Can't be included in a workflow
  - Can't be a member of any user groups
  - Can't edit content
- Deleting a User
  - A user is only marked deleted in the database; all information about the user remains, for references such as Last User to Edit.
  - Content that is currently checked out by a deleted user is automatically checked in
  - The user is removed from any workflows and in-process content blocks are bumped to the next stage, which may cause them to be published. For this reason Ektron recommends that workflows be created with user groups instead of individual users.
- Roles
  - Give CMS Users or User Groups partial CMS Administrator privileges
  - The CMS has built-in roles and supports custom roles

Exercise 18-1: Adding a User

1. In the Workarea, click on the **Settings** tab.
2. Click on **Users** and a list of available users will appear in the right pane.
3. Click the **Add User** button ( ).
4. Create a user named "User1" with the following information:
   Username: "User1"
   First Name: "User"
   Last Name: "One"
   Display Name: "User1"
   Password: "user1"
   Confirm Pwd: "user1"
   User Language: "App Default"
   E-Mail Address: "user1@sample.com"
   Forum Editor: "eWebEdit400"
   Avatar: leave blank
   Address: 03060
   Check **Disable Receiving of System Notification E-mail**.
   ***Region** – select any region



5. Click the **Save** button ( ) to save the new user.
6. Repeat steps 4-6 to create users:
   - "Manager1" with password "manager1"
   - "Ima Gone" with password "ima"
   - Add yourself as a user. (remember your password)

Exercise 18-2: Deleting a User

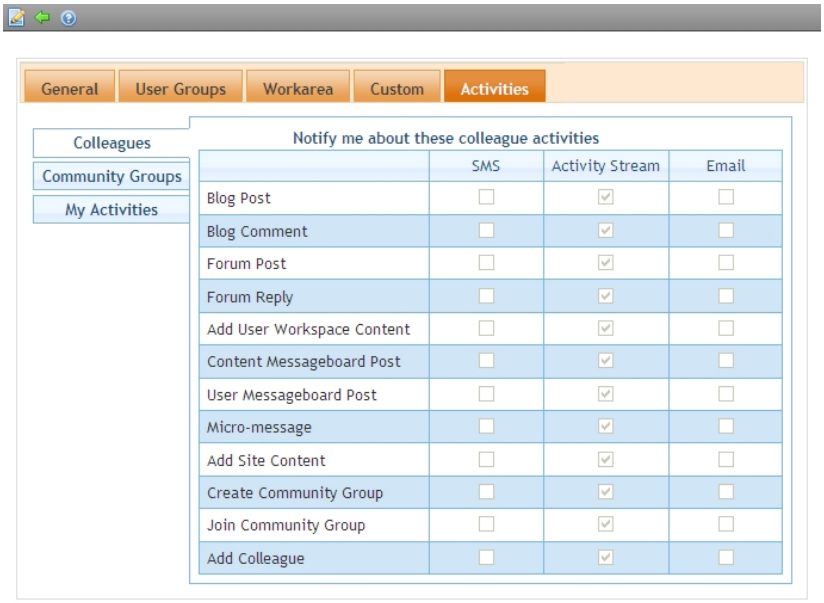
There are two ways to delete users in the CMS.

1. Click on **Users** to view all the users.
2. Delete "Ima Gone" by checking the boxes next to the name.
3. Click the delete button ( ).

Note: Do not delete yourself from the User list.

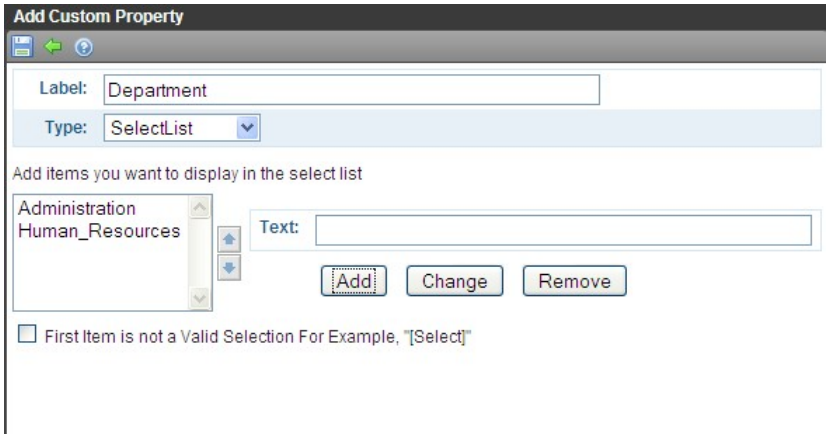
Exercise 18-3: Updating User Information

To update user information, click on the user name. There are tabs for general, work page, custom and activities.



Exercise 18-4: Adding Custom Properties

1. In the Workarea, select the **Settings > Configuration > Custom Properties > User Properties**.
2. To add new Custom Properties select the **Add** icon ( ).
3. Add the following information:



4. Click the **Save** button ( ) to add the new custom property.

Exercise 18-5: Creating & Populating User Groups

1. In the Workarea, select the **Settings** tab, then click on **User Groups**.
2. Click the **Add User Group** button ( ).

3. For the **User Group Name**, enter "Group1". The **Description** field is optional.
4. Click the **Save** button ( ) to save the group. Now you should see the **User Group Name** list, with "Group1" added.
5. Click on "Group1" to view users in the group. Since it's a new User Group, there won't be any users in it.
6. Click the **Add User** button ( ). The complete list of users will appear in the right pane.
7. Check the following users:
   - "User1"
   - "Manager1"
   - Yourself
8. Click the **Save** button ( ) to add these users into the Group. A pop-up window will ask "Are you sure you want to add selected user(s) into this group?"
9. Click **OK**.
10. Add the following groups:
    - "Content Editors"
    - "Content Approvers"
11. Add "User1" to the "Content Editors" group and add "Manager1" to the "Content Approvers" group.

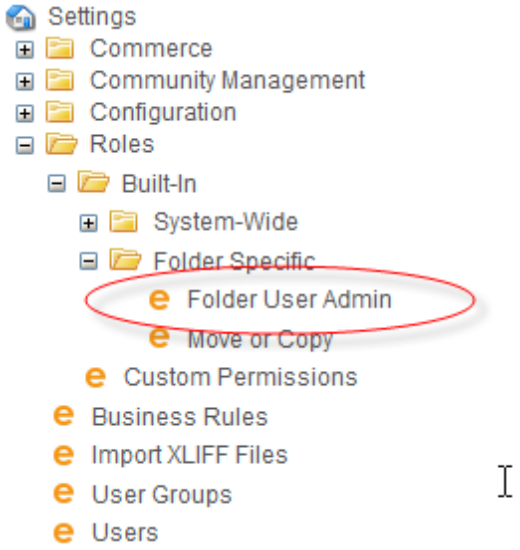
EDITORS	APPROVERS
User1	Manager 1

Exercise 18-6: Assigning a Role to a User

Specific roles can be given to various users or groups that give permissions that normally only ad administrator would have. By doing this, you can provide additional functionality without assigning them all the privileges of an administrator.

We will give "Manager1" the role of "Folder User Admin" and the ability to copy and move content.

1. In the Workarea click on the **Settings** tab.
2. Open **Roles > Built-In > Folder-Specific**.



3. Click on **Folder User Admin**.
4. Click the **Add Role Member** button ( ).
5. Check the box beside "Manager1"
6. Click the **Save** button ( ).The user is added to the Role Member Name list.

Exercise 18-7: Removing a Role Assigned to a User

1. Click the minus sign [ ] in the toolbar
2. Check the box beside the username "jedit".
3. Click the **Delete** button ( ). The user is removed from the Role Member Name list.

Unit 19 – Setting Folder Permissions

Reference: "Permissions" chapter in *Ektron CMS400.NET Reference Manual.*

Exercise 19-1: Setting Folder Permissions

1. On the **Content** tab, select "Test Folder".
2. On the **View** menu, select **Folder Properties**.
3. Click the **View Permissions** button ( ).
4. Uncheck **Allow this object to inherit permissions**, then click **OK** on the popup message.
5. Click the **Add Permission** button ( ).
6. Select the following CMS groups below to add to folder:

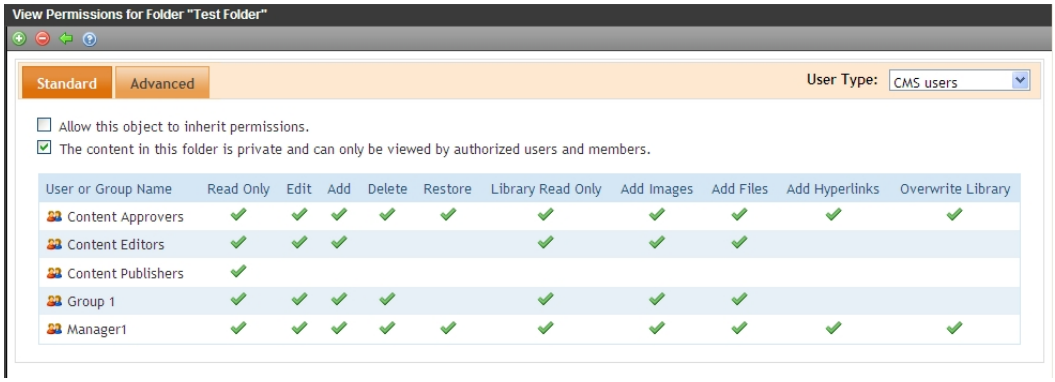
   Content Approvers – Full Permissions, as well as advanced permissions

   Content Editors – Read Only, Edit, Add, Delete, Library read only, Add images

   Content Publishers – Read Only

   Group 1 – Read only, edit, add, delete, library read only, add images

   Manager1 – Full Permissions, as well as advanced permissions

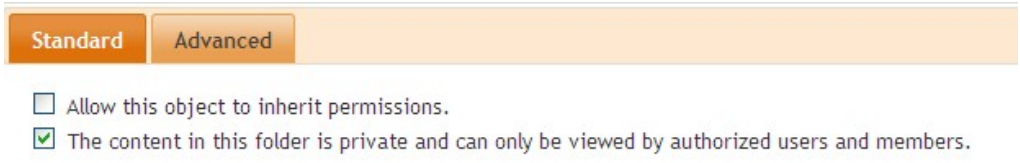


7. Click the **Save** button ( ).
8. Click the **Delete Permission** button ( ) and select "Everyone".
9. Click the **Delete Permission** button ( ) and select "jedit".
10. Click **OK** in the pop up to delete the Everyone Group's permissions for this folder.

Exercise 19-2: Making Content Private

This makes the content in this folder private. This means it is only viewable by authorized CMS users and membership users.

1. On the **Content** tab, select the "Test Folder" and view its properties.
2. In the **View Permissions** screen, check **The content in this folder is private and can only be viewed by authorized users and members**. A popup message asks you to confirm.
3. Take note of a Content ID number inside this folder (for step 5 below)
4. Click **OK**.


Standard
Advanced
Allow this object to inherit permissions.
The content in this folder is private and can only be viewed by authorized users and members.

5. Logout of the CMS.
6. Check the content on the site by entering the following URL: http://localhost/cms400developer/news.aspx?id=xx (where xx is your content ID number.)
   The private content will no longer be visible.
7. After seeing the Private effect, go back to the Test Folder and uncheck the Private setting.

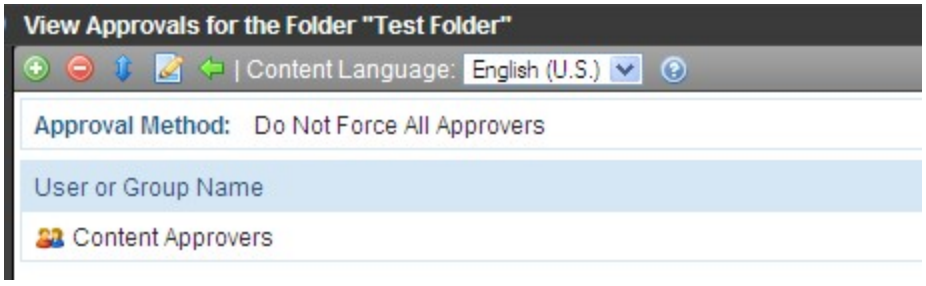
Unit 20 – Content Approval Chains

Reference: "Approval Chains" chapter in *Ektron CMS400.NET Reference Manual.*

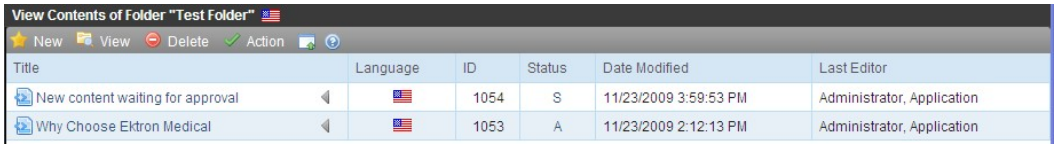
Content approval chains can be as simple or as complex as required to suit the needs of your organization. Since it is more efficient to manage User Groups than individual users, we recommend creating your approval chain with User Groups.

Exercise 20-1: Setting up an Approval Chain

1. In the Workarea, select the "Test Folder".
2. Create a new folder called **Approvals**.
3. After you add the 'Approval' folder go to **View > Folder Properties**.
4. Click the View Approvals button ( ).
5. Click on the Add button ( ).
6. Select the "Content Approvers" group and click **OK**.
   You now have a simple approval chain for this folder.


View Approvals for the Folder "Test Folder"
Content Language: English (U.S.)
Approval Method: Do Not Force All Approvers
User or Group Name
Content Approvers

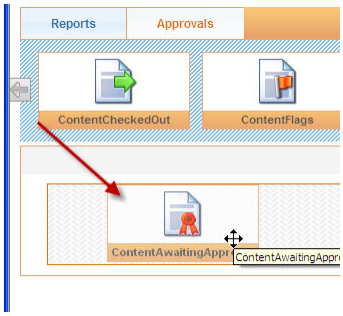
7. Logout, then Login as "User1" (a member of the "Content Editors" group)
8. Create a new content item in the "Test Folder".
9. Click the **Submit** button ( ) to submit the content for approval.
10. After adding content, click on the "Test Folder" to see that the content has submitted, Notice the Status "S" for submitted content.


View Contents of Folder "Test Folder"
New View Delete Action
Title Language ID Status Date Modified Last Editor
New content waiting for approval 1054 S 11/23/2009 3:59:53 PM Administrator, Application
Why Choose Ektron Medical 1053 A 11/23/2009 2:12:13 PM Administrator, Application

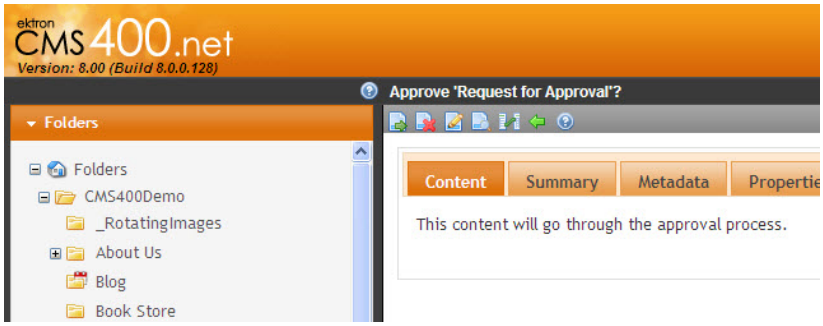
11. To see this effect on existing content, edit existing content and Submit it.

Exercise 20-2: Approving, Declining and Publishing Content (Smart Desktop)

1. Login as "Manager1" (a member of the Content Approvers group) and open the Workarea.
2. You will need to create an approval tab in the Smart Desktop, and drag and drop the approval widget into an open column.
3. After you drop the widget in you will see your content that is waiting for your approval.



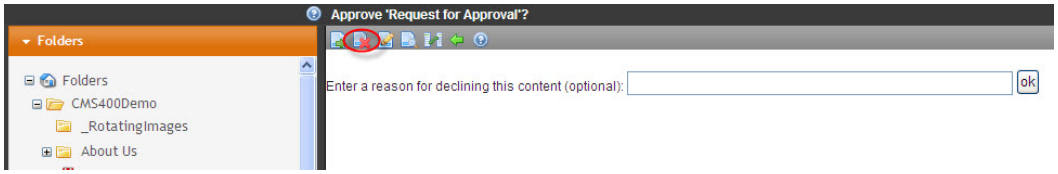
4. Click on one the title of the content you are approving and the following screen will appear:



As Manager1 (a member of the Content Approvers group) you will see options to Publish, Decline, Edit, View Published, View Diff, or Back.

a. Either click the **Publish** button ( ) to publish the content to the live site, ...

b. Or click the **Decline** button ( ) to decline the content. A pop-up window will appear where you can enter the reason for declining the content, then click OK.

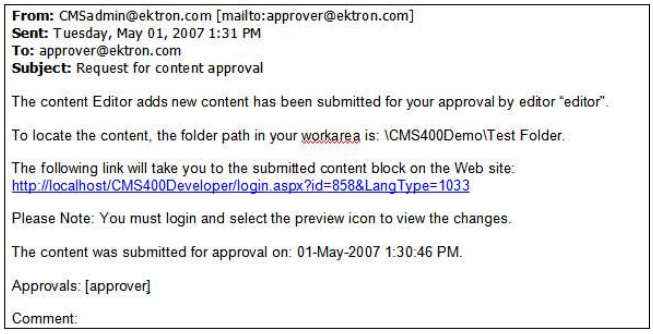


Exercise 20-3: Approving, Declining and Publishing Content (E-mail Link)

Note: Email configurations must be set in the Setup area and the CMS User profile must contain a valid email that is enabled for the following exercise to work.

When content is submitted for approval, an e-mail is sent to the approver(s) informing them that there is content awaiting approval. The e-mail contains a URL to the page where the content will be displayed:

1. If you received an e-mail, Click on the URL Link. You will be taken to that content page.


From: CMSadmin@ektron.com [mailto:approver@ektron.com]
Sent: Tuesday, May 01, 2007 1:31 PM
To: approver@ektron.com
Subject: Request for content approval

The content Editor adds new content has been submitted for your approval by editor "editor".

To locate the content, the folder path in your workarea is: \CMS400Demo\Test Folder.

The following link will take you to the submitted content block on the Web site:
http://localhost/CMS400Developer/login.aspx?id=858&LangType=1033

Please Note: You must login and select the preview icon to view the changes.

The content was submitted for approval on: 01-May-2007 1:30:46 PM.

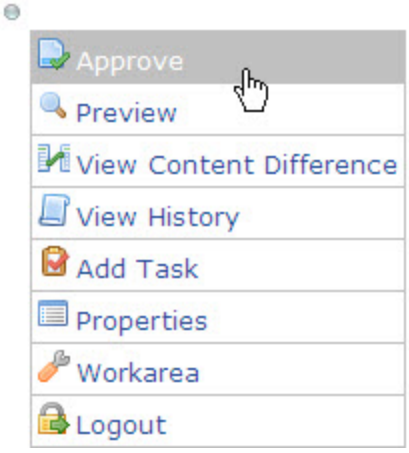
Approvals: [approver]

Comment:

2. Log in to the CMS.

Note: The revised content will not be visible as it has not yet been approved.

3. Hover over the access point and see the menu.



Note: If the content is new it may appear blank on the web page.

4. To see the new version of the content, select **Preview** from the dropdown list. The content awaiting approval will appear a new window.
5. Alternately, you can select **View Content Difference** to see what has changed in the content.
6. To Approve, Decline or Edit the content, click on the **Approve** button to open the content in the Workarea, then perform the required action.

Exercise 20-4: Deleting an Approval Chain

1. Login as "Admin" and go to the Workarea.
2. Go to the **Content** tab and select the "Test Folder".
3. View the **Folder Properties**.
4. Click the **View Approvals** button ( ).

5. Click on the **Delete** button ( ),
6. Select "Content Approvers" and click **OK**. The approval chain is deleted.

Note: We recommend that you turn off approval chains after this exercise

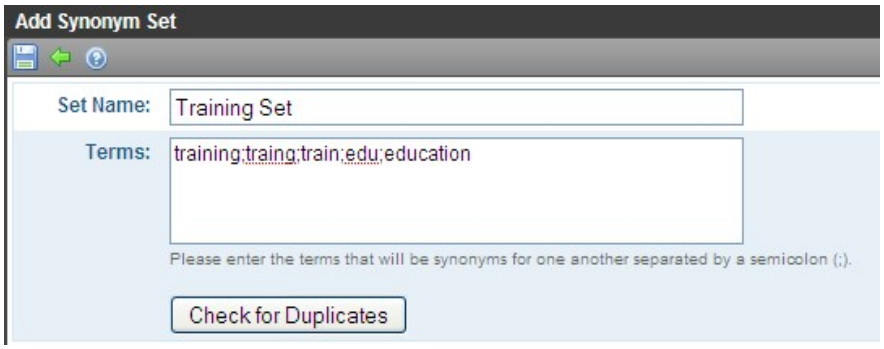
Unit 21 – Search

Reference: "Search" chapter in *Ektron CMS400.NET Reference Manual.*

Exercise 21-1: Synonyms

Synonyms allow the administrator to set results for searches when the visitor misspells or uses old terms.

1. In the Workarea, open the **Settings** Tab.
2. Select the **Configuration > Search** folder and open it.
3. Click on **Synonyms**.
4. To add a suggested result click on the **Add Synonym Set** ( ).
5. Set the **Set Name** to "Training Set".


Add Synonym Set
Set Name:
Training Set
Terms:
training;traing;train;edu;education
Please enter the terms that will be synonyms for one another separated by a semicolon (;).
Check for Duplicates

6. Add a list of terms that you want to be synonymous with training (including the word training) such as: training, education, traing, and edu.

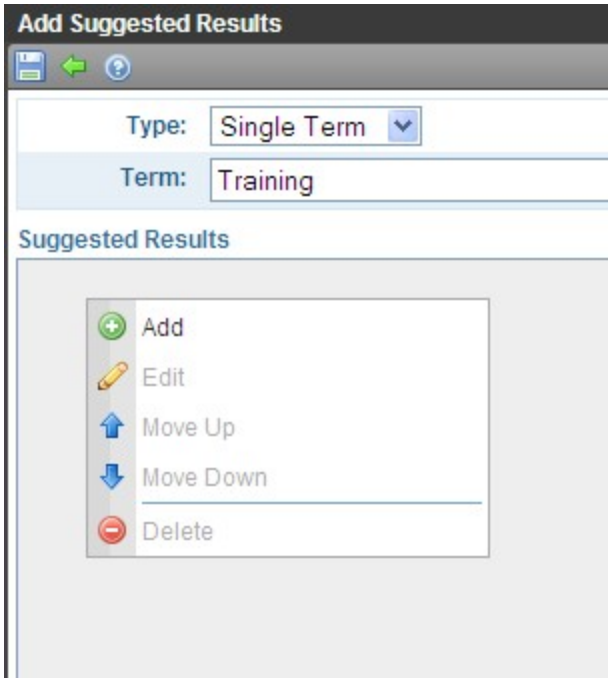
Note: Add a semi colon between each of the terms.

7. Click the **Save** button ( ) when done. Searching for any of the terms in the synonym set will return the same results.

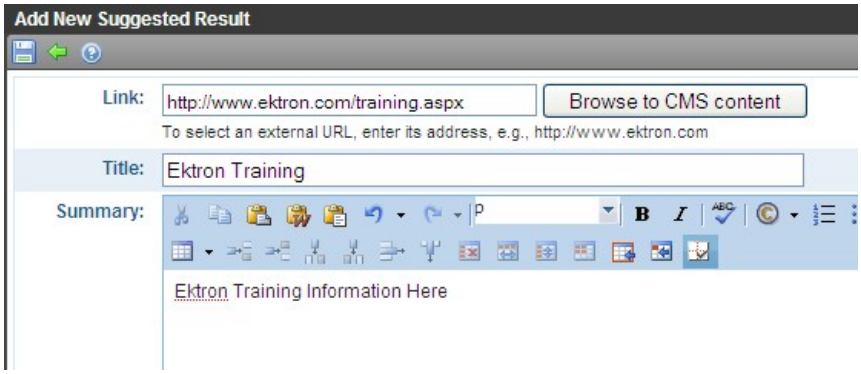
Exercise 21-2: Suggested Results

1. In the Workarea, open the **Settings** Tab.
2. Select the **Configuration > Search** folder and open it.
3. Click on **Suggested Results**.
4. To add a suggested result click on the **Add New Suggested Results Set** ( ).

5. Add a single term called "training".



6. Click in the Suggested Results box, select "Add" from the menu and fill out the fields like this:



7. Click the **Add** button ( ), then the **Save** button ( ) when done.

Note: The indexing system may take a couple of minutes to add this new suggested result to the search results. If you do not see the results immediately, try again in a few minutes.

To search the site:

1. Click on **>> Site Search** on the Ektron Medical site home page:

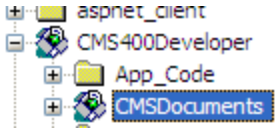
2. Enter "training" and click the **Search** button.

Results of a search look like this:

Exercise 21-3: Integrated Search

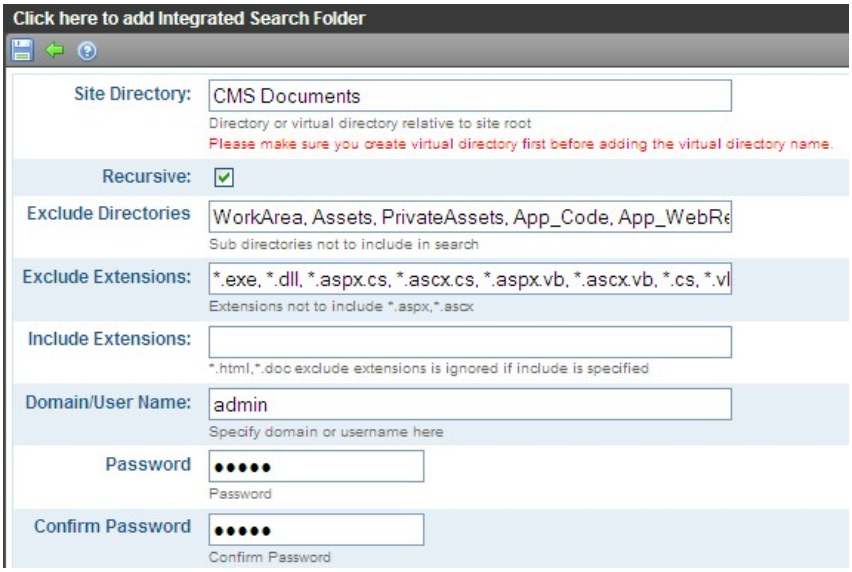
You can expand the Web search to any Web-accessible files on your server, even if they are not part of Ektron CMS400.NET. The Integrated Search only works with a Web Search server control that is placed on a Web page. It does not work with the Workarea search or any other search server control. Use an Integrated Search if your site's search should include non-Ektron CMS400.NET files which, nevertheless, need to be searchable by site visitors.

Since creating a virtual folder is a Windows procedure, the procedure is explained in http://support.microsoft.com/kb/301392/en-us?FR=1&PA=1&SD=HSCH.

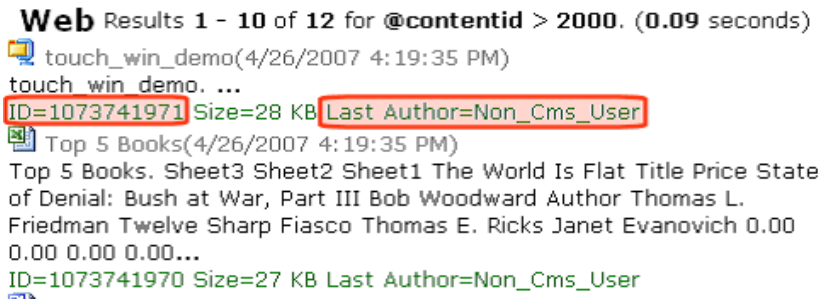


This illustrates an IIS Virtual Directory called "CMSDocuments" that is pointed to the folder called: C:\Program Files\Ektron\CMS400v80\Documentation.

Add the Virtual Directory name in the **Settings->Configuration->Integrated Search Folders** configuration.


Click here to add Integrated Search Folder
Site Directory:
CMS Documents
Directory or virtual directory relative to site root
Please make sure you create virtual directory first before adding the virtual directory name.
Recursive:
Exclude Directories
WorkArea, Assets, PrivateAssets, App_Code, App_WebR
Sub directories not to include in search
Exclude Extensions:
*.exe, *.dll, *.aspx.cs, *.ascx.cs, *.aspx.vb, *.ascx.vb, *.cs, *.vl
Extensions not to include *.aspx,*.ascx
Include Extensions:
.html,.doc exclude extensions is ignored if include is specified
Domain/User Name:
admin
Specify domain or username here
Password
Password
Confirm Password
Confirm Password

To distinguish Integrated Search content from regular content, the ID number of this content begins with 1,000,000,000. Also, the last author name is Non_Cms_User.


Web Results 1 - 10 of 12 for @contentid > 2000. (0.09 seconds)
touch_win_demo(4/26/2007 4:19:35 PM)
touch_win_demo. ...
ID=1073741971 Size=28 KB Last Author=Non_Cms_User
Top 5 Books(4/26/2007 4:19:35 PM)
Top 5 Books. Sheet3 Sheet2 Sheet1 The World Is Flat Title Price State of Denial: Bush at War, Part III Bob Woodward Author Thomas L. Friedman Twelve Sharp Fiasco Thomas E. Ricks Janet Evanovich 0.00 0.00 0.00 0.00...
ID=1073741970 Size=27 KB Last Author=Non_Cms_User

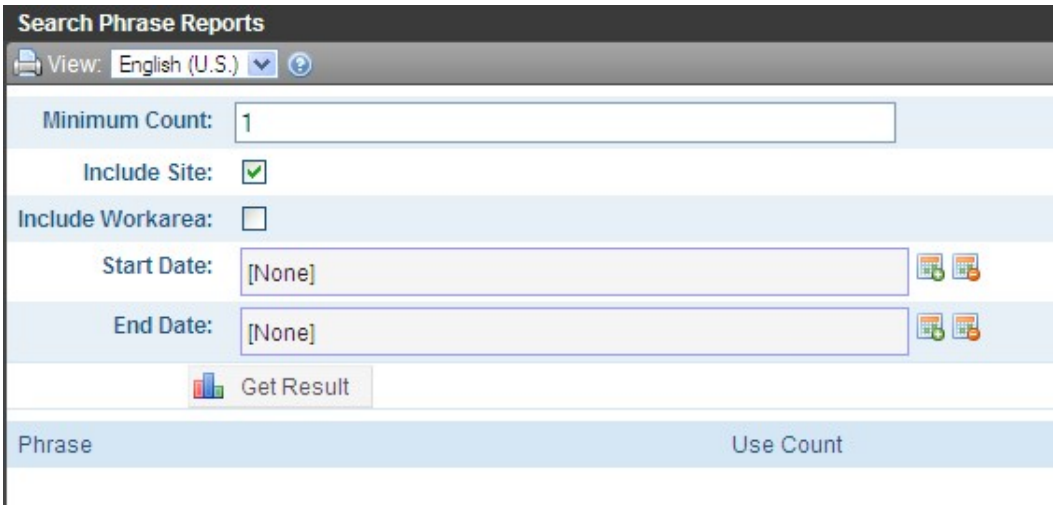
Note: Allow a few minutes to pass before searching integrated content so that the indexing service has time to refresh. Then search for a term not found in the CMS400Developer site like "Plug-In"

DEVELOPERS need to set the WebSearch Server control property "CustomSearch" to the same name as the virtual directory.

Exercise 21-4: Search Phrase Report

This report will help you understand what your visitors are looking for on your web site.

To run this report, select the **Reports tab > Contents > Search Phrase Reports**.


Search Phrase Reports
View: English (U.S.)
Minimum Count: 1
Include Site:
Include Workarea:
Start Date: [None]
End Date: [None]
Get Result
Phrase
Use Count

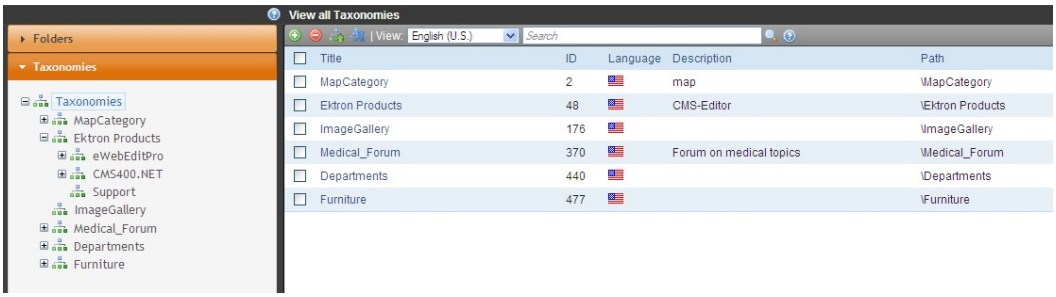
Unit 22 – Taxonomy

Reference: "Taxonomy" chapter in *Ektron CMS400.NET Reference Manual.*

Ektron CMS400.NET's Taxonomy Feature lets you assign custom information categories to folders or individual content items. You can then place a listing of those categories (Taxonomy) on any section of a Web page. When that page displays, all published items in that Taxonomy appear. Taxonomy is an easy way to organize and display Web site content according to your categories. You can assign any number of content items from any folder to a Taxonomy.

This exercise will add a new category to the Ektron Products taxonomy and apply it to content already existing in the Ektron Medical site.

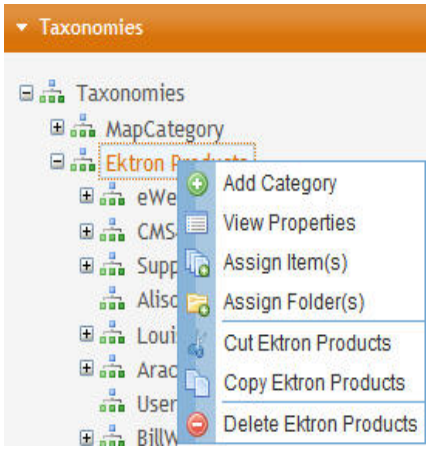
- Taxonomy categorizes content but is unlike folders in the Workarea.
- The "directory server control" is used to display the taxonomy categories.
- Taxonomy displays content categories in a way that makes sense to the site visitor instead of the administrator or content editors.
- Taxonomy allows a single piece of content to appear in many different categories on a web site.
- There is no limit to the number of category levels you can assign to a taxonomy.
- Individual content items can be assigned categories or entire folders can be associated to a taxonomy.
- Taxonomy is a useful tool when filtering Search Results.
- Taxonomy categories can be set for content, content folders, blogs, discussion topics, templates, URL Alias, Users, Members, and Groups.
- Only administrators or users to whom the Taxonomy-Administrator role has been assigned can see the Taxonomy option in the content tab.
- Taxonomies can be assigned to content at the folder level. So, taxonomy on one folder may not be available in another.
- Taxonomy display style can be controlled by EKML.
- Taxonomy data can be exported and imported as XML files.



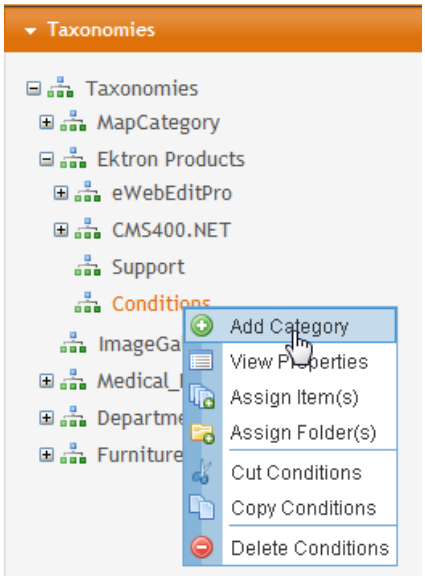
Exercise 22-1: Taxonomy

1. In the Workarea, select the **Content** tab and select the taxonomies tab on the left hand side.

2. Click on **Ektron Products** (id 48).
3. Right-click "Ektron Products" then select **Add Category** .



4. For the Category Title enter "Conditions".
5. Click the **Save** button ( ).
6. Click on the category "Conditions".
7. Right-click "Conditions" and select **Add Category** to add new categories under Conditions.

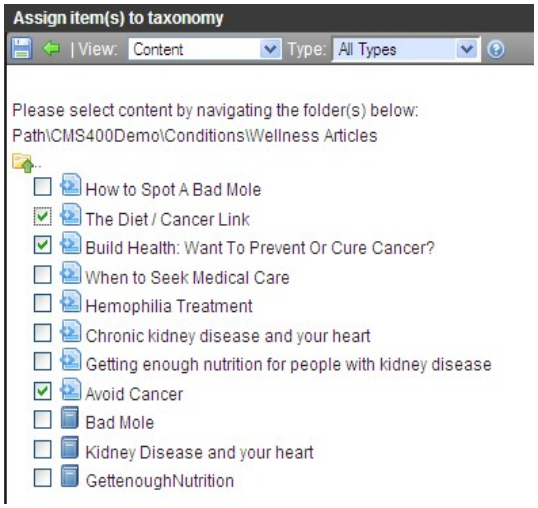


8. Add three conditions: "Heart Disease", "Cancer" and "Kidney Disease"

Exercise 22-2: Assigning Content Items to Taxonomy Categories

1. Select the cancer taxonomy and select the add items to taxonomy icon ( ).
2. In the folder display, navigate to: **CMS400Demo > Conditions > Wellness Articles** and check cancer-related articles.

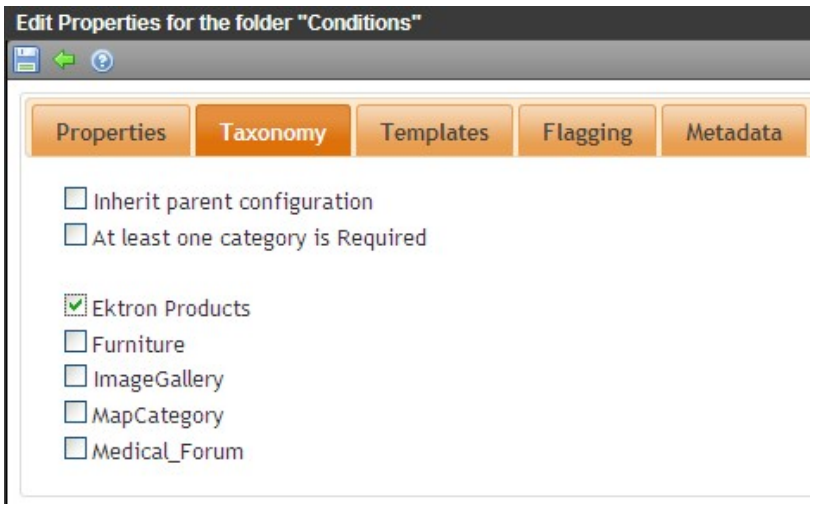
3. Click the **Update** button ( ).
4. Repeat steps 1 through 3 for the following folder:
   CMS400Demo > Book Store.
5. Assign items (at least one each) to the "Kidney Disease" and "Heart Disease" categories.
6. To see the results, go to the Ektron Medical page in **Contact Information > Wiki**: http://localhost/CMS400Developer/wiki.aspx. Near the bottom, you will see the Category display with "Conditions" as one of the choices.
7. Click on "Conditions", then one of the diseases to see all the content in its taxonomy.


Assign item(s) to taxonomy
View: Content
Type: All Types
Please select content by navigating the folder(s) below:
Path\CMS400Demo\Conditions\Wellness Articles
How to Spot A Bad Mole
The Diet / Cancer Link
Build Health: Want To Prevent Or Cure Cancer?
When to Seek Medical Care
Hemophilia Treatment
Chronic kidney disease and your heart
Getting enough nutrition for people with kidney disease
Avoid Cancer
Bad Mole
Kidney Disease and your heart
GettenoughNutrition

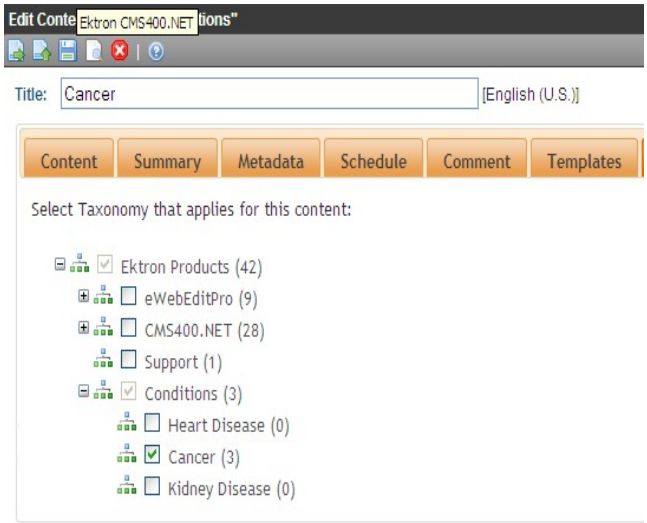
Exercise 22-3: Assigning a Taxonomy Category to a Content Item

1. In the Workarea, click on the **Content** tab, then go to the **CMS400Demo > Conditions** folder.
2. View the folder **Properties**.
3. Click the **Edit** icon ( ).
4. Click the **Taxonomy** tab.+*Inherit Parent Configuration* should be unchecked.

5. Check *Ektron Products*.



6. Click the **Update** button ( ).
7. Click on the "Conditions" folder.
8. Click on the content item named "Cancer" (ID 38). Note that if you look at the Category tab, it is blank.
9. Click the **Edit** button ( ) and choose the **Category** tab.
10. Select the **Ektron Products > Conditions > Cancer** taxonomy item (expand the categories by clicking the plus sign next to them).
11. Click the **Publish** button ( ).
12. To see the results, go to the Ektron Medical page **Contact Information > Wiki**: http://localhost/CMS400Developer/wiki.aspx. Near the bottom, you will see the Category display with "Conditions" as one of the choices.
13. Choose **Conditions > Cancer**. You will see the new Cancer content you added.

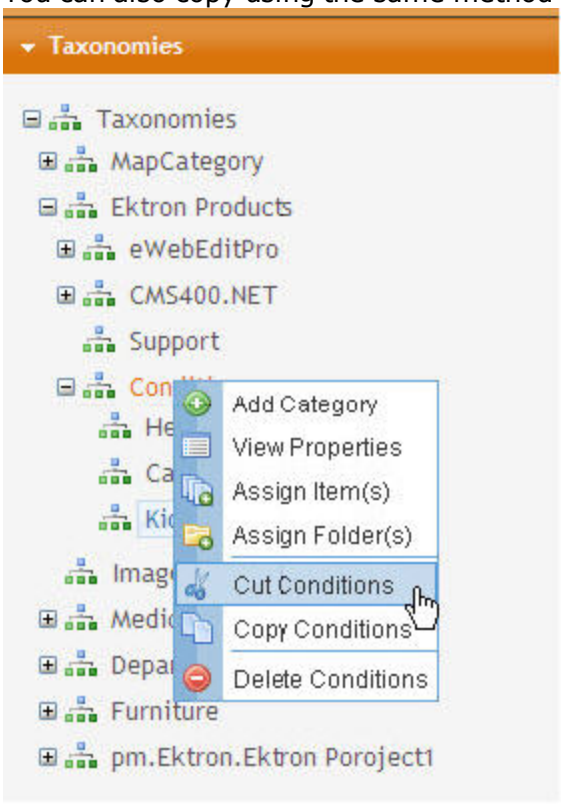


Exercise 22-4: Copying and moving a Taxonomy Category

This feature allows you to change the order and structure of your taxonomy easily after adding items to the categories. Not only with the taxonomy categories move, but it will also keep anything you have previously associated with that category.

1. Place your cursor over the taxonomy node "conditions" that we just created.
2. **Right click** and select "cut conditions"
3. Click on the "**support**" taxonomy node.
4. **Right click** and select Paste Taxonomy.

You can also copy using the same method as above, only selecting "copy conditions" instead of cut.



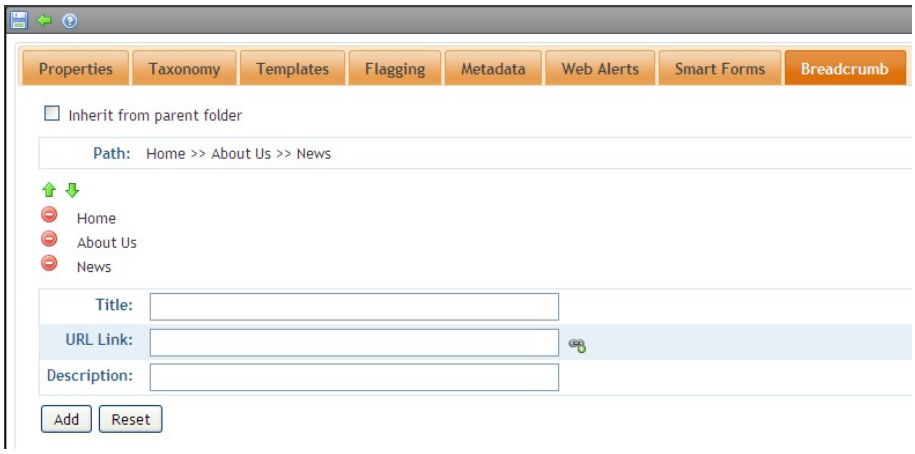
Unit 23 – Creating Folder Breadcrumbs

Reference: "Breadcrumbs" chapter in *Ektron CMS400.NET Reference Manual.*

Breadcrumbs are navigational aids for visitors to your site, which show them the path to the page they're on. Check with your developers regarding the actual links to use in the Folder Breadcrumbs. [To read more about Breadcrumbs, please read the Breadcrumbs section in Admin Manual – Managing Content.]

Exercise 23-1: Changing a Breadcrumb

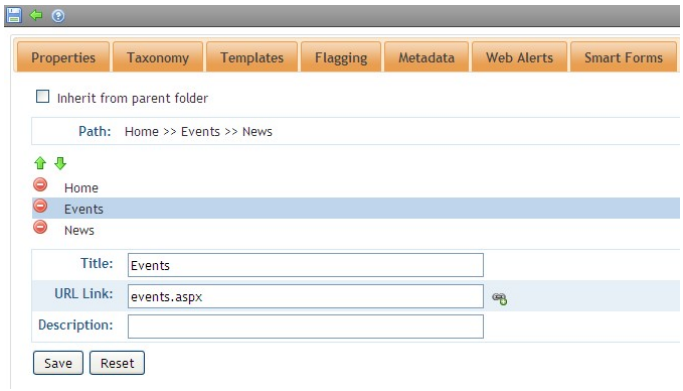
1. In a browser, navigate to the **About Us > News** page. Notice the breadcrumb that says **Home > About Us > News**.
2. Go to the Workarea and select the folder **About Us > News**.
3. Go to **View > Folder Properties**.
4. Click the **Edit** button ( ).



5. Click on the **Breadcrumb** tab.
6. Remove the "About Us" path in the breadcrumb by clicking the **Delete Path** button ( ).
7. Click the **Update** button ( ).
8. Navigate to the **About Us > News** page again. Notice the breadcrumb change.

Exercise 23-2: Adding Another Level to a Breadcrumb

1. In the Workarea and select the folder **About Us > News**.



2. Go to **View > Folder Properties**.
3. Click the **Edit** button ( ).
4. Click on the **Breadcrumb** tab.
5. Enter"Events" in the Title Field.
6. Enter "events.aspx" in the URL Link field.
7. Click the **Add** button.
8. Move the "Events" breadcrumb up one level by first clicking on it (it will display in blue) then use the green UP arrow. Your breadcrumb order should now be **Home > Events > News**.
9. Click the **Update** button ( ).
10. Navigate to the **About Us > News** page again. Notice the breadcrumb change.

Exercise 23-3: Site Map from the Breadcrumb Settings

The Folder Breadcrumb control automatically generates a site map, which you can view as follows:

In your browser, go to the Ektron Medical page, click on **Contact Information > Site Map**. This shows the site map that is automatically created as you create the folder breadcrumb settings. Notice that the site map reflects the **Home > Events > News** hierarchy.

- Home
  - About Us
    - Staff
    - Careers
    - Calender
  - Services
  - Products
  - Therapies
  - Conditions
    - Wellness Articles
  - Contact Information
  - Events
    - News
  - Blog
  - Search

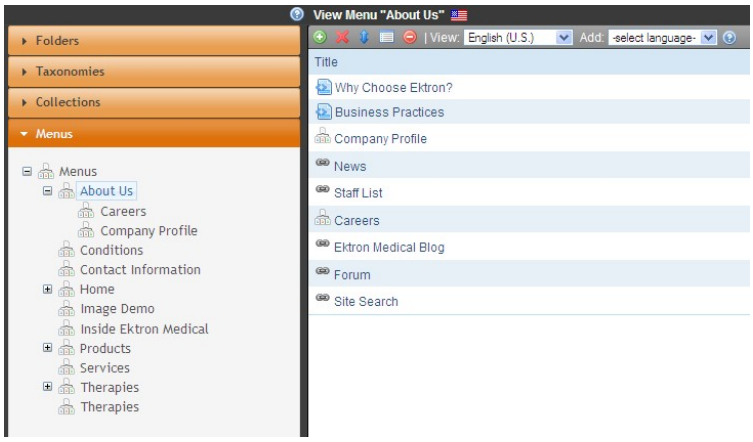
A SiteMap server control is added to the template by the developer. The sample results are shown here.

Unit 24 – Menus

Menus are used to create a consistent navigational structure for your site with easy maintenance by the site administrators.

Exercise 24-1: Adding a content item to a Menu

1. Login as Admin on the Ektron Medical site and go to the Workarea.



2. Click the **Content Tab**.
3. Click the **Menu bar** in the lower left.
4. Click **About Us.**
5. Select the **Add Items** ( ).
6. Choose **Content Item** and click the **Next** button.
7. Browse to the **CMS400Demo>About Us** folder.
8. Check the box next to the "About Us" content.

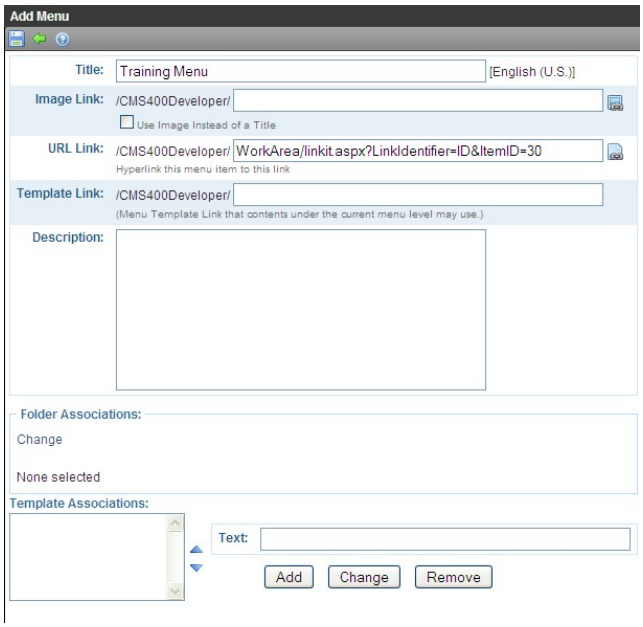
Note: You can also add DMS documents or Library assets to the menu.

9. Click the **Add** button ( ) to add the content items to the menu.

Exercise 24-2: Creating a Menu

1. Select the "Test Folder".
2. Go to **New > Menu**.
3. Enter the Title "Training Menu".
4. On the URL Link field, click on the **Select Page** button ( ) to choose the content for this menu item.
5. In the folder structure, select a content.
6. Click the **Save** button ( ) to save the content selection.

7. Click the **Save** button ( ) to save the menu. The new menu can be edited as in the previous exercise.



Best Practice Tips

Create Menus at the folder level, so the Menus will inherit the permissions of the folders in which they are created. It is not recommended to create menus on the root level located in the Content tab. Menus created directly within the folder structure will allow give the ability to apply permissions to the menus.

Exercise 24-3: Adding an External Hyperlink

1. In the **Workarea>Content>Menus**, right-click on "Training Menu".
2. Click **Add Items**. The Add New Item page appears.
3. Check **External Hyperlink**.
4. Click the **Next** button.
5. Enter "Ektron" in Title field and "http://www.ektron.com" in the Link field.
6. Click the **Save** button ( ).

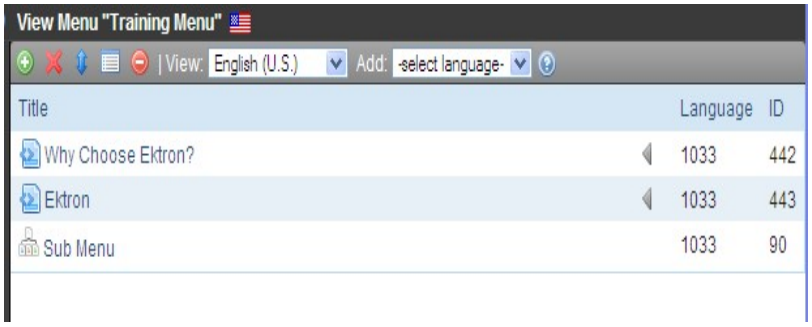
Exercise 24-4: Adding a Sub Menu

1. In the **Workarea>Content>Menus**, right-click on "Training Menu".
2. Click **Add Items**. The Add New Item page appears.
3. Choose **Sub Menu**.
4. Click **Next**.
5. Enter "Sub Menu" in the Title field.

6. Click the **Save** button ( ).
7. Right-click on "Sub Menu".
8. Click **Add Items**
9. Check **External Hyperlink**.
10. Click the **Next** button.
11. Enter "Ektron" in Title field and "http://www.ektron.com" in the Link field.
12. Click the **Save** button ( ).

Exercise 24-5: Editing a Menu Item

1. In the **Workarea>Content>Menus**, click on "Training Menu".
2. Click "Ektron" content to edit this menu.
3. For Target, click "Popup".
4. Click the **Save** button ( ).



Exercise 24-6: Reordering Menu Items

1. Select the Reorder Icon ( ) to shift the content items
2. Select a menu item.
3. Use the Up or Down arrow on the right to move that item up or down the order. Note that "Sub Menu" is included in the list.
4. Click the **Update** button ( ) when done.

Exercise 24-7: Deleting a Menu Item

1. In the **Workarea>Content>Menus**, click on "Training Menu".
2. To delete "Ektron" from the menu, click the Remove Items button ( ).

Note: Be careful not to choose the Delete Menu ( ) button that will remove the entire menu.

Exercise 24-8: Deleting a Menu

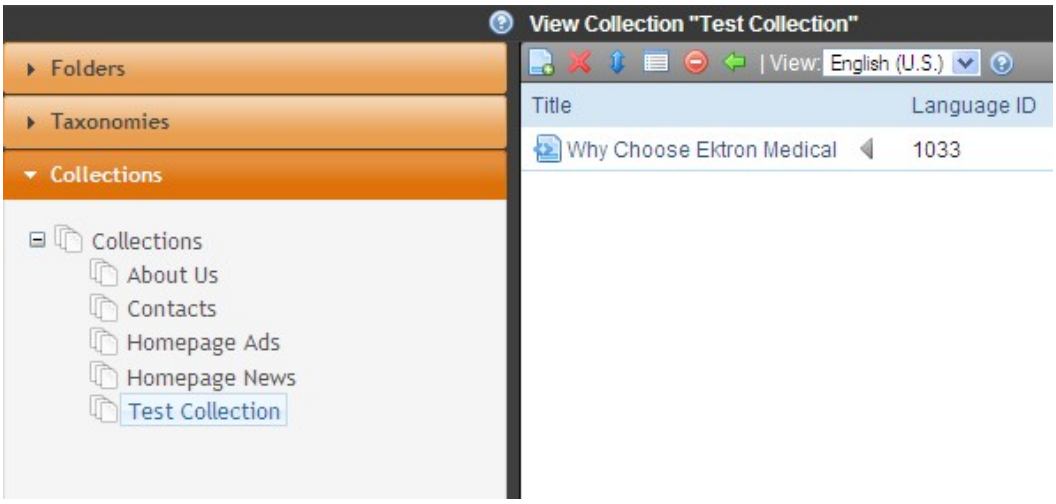
1. Select the "Training Menu."
2. Click Delete Menu ( ) to remove the menu.

Unit 25 – Collections

Reference: "Collections" chapter in *Ektron CMS400.NET Reference Manual.*

Collections permit content items from multiple folders to be displayed in a single area. They can also be used to add dynamic elements to your site that present different content each time a visitor accesses the site.

Exercise 25-1: Creating a Collection



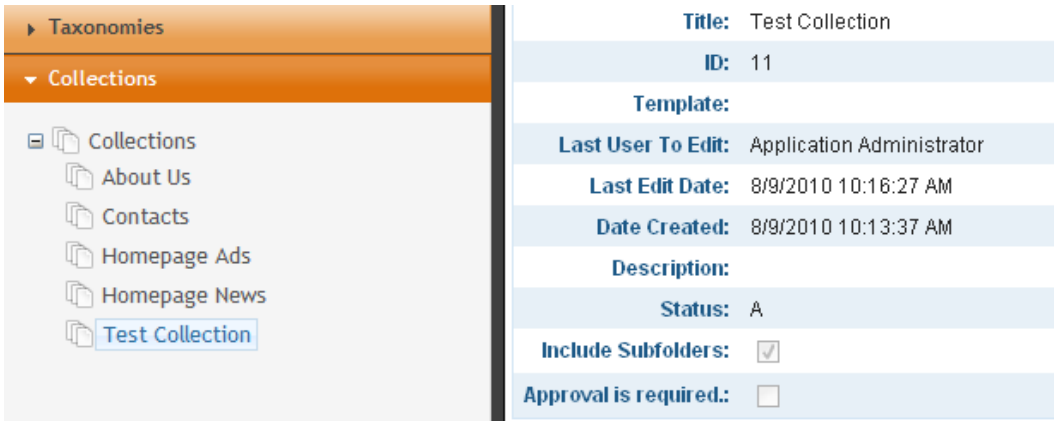
1. In the Workarea select the **Content Tab**.
2. On the left, select **Collections**.
3. Right-click on Collections at the top of the list.
4. Click **Add Collection**.
5. Enter "Test Collection" as the Title of the collection.
6. Check **Include Subfolders**.
7. Click **Save** ( ). "Test Collection" is added.

Exercise 25-2: Adding Items to a Collection

1. Click on "Test Collection".
2. Click the **Add** button ( ).
3. Select content for the collection by checking the box next to the content title.
4. Click the **Add** button ( ) to add the content to the collection.
5. Select content from multiple folders.
6. Click add ( ) to add the content into the collection.

To view the new collection on a web page:

1. Right-Click on "Test Collection" and select View Properties.



2. Note the ID number of the collection.
3. In a browser, enter the URL:
   "http://localhost/CMS400Developer/aboutus.aspx?Coll_ID=xx" where xx is the number of the Collection you created.
   For example: **http://localhost/CMS400Developer/aboutus.aspx?Coll_ID=11**.

Exercise 25-3: Removing Items from a Collection

1. Click on "Test Folder" then **View > Collections**.
2. Click on "Test Collection".
3. Click the **Remove** button ( ).
4. Check all the items you would like to remove from the Collection.
5. Click the **Delete** button ( ) to remove them from the Collection.

Exercise 25-4: Reordering Collection Items

1. Click the **Reorder** button ( ).
2. Select a collection Item.
3. Use the Up or Down arrow on the right to move that item up or down the order.
4. Click the **Update** button ( ) when done.

Unit 26 – Business Rules

Reference: "Business Rules" chapter in *Ektron CMS400.NET Reference Manual.*

Business Rules allow you to define conditions for Web pages on your site. You choose an action based on whether the conditions are true or false when a site visitor browses your site. For example:

- Condition - a site visitor visits your site for the first time
- Action - add a cookie and pop up a welcome message

With Business Rules, you do not write code to set conditions and initiate actions. You simply complete the information requested in the Business Rules wizard, have your developer add a Business Rules server control to your Web form, and assign the server control the Business Rules Ruleset..

[Instructors: Be sure Symantec Ad Pop Blocker is off for the following exercise to work.]

Exercise 26-1: How a business rule works (query string example)

1. Logout of the Workarea if you are logged in.
2. Go to the home page of the Ektron Medical site. (http:/-/localhost/cms400developer/default.aspx)
3. Now add this string to the end of the URL "?patient=false".

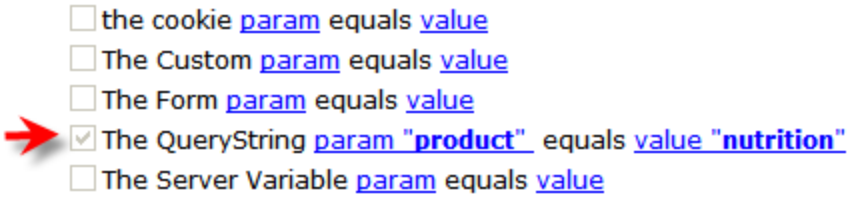
4. When you press <enter>, notice that the membership signup page opens because the business rule is instructed to do so when this query string parameter is found.
5. Close the pop-up window before proceeding to the next exercise.

Exercise 26-2: How to Set/Read Cookies with Business Rules

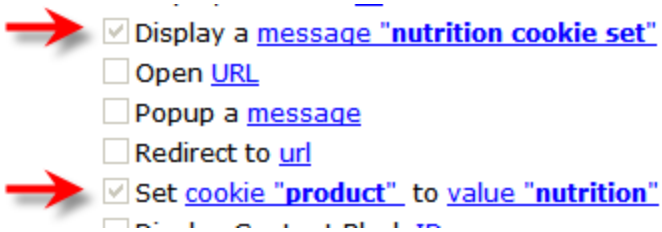
This exercise sets cookies according to a query string parameter then displays content according to the cookie that is found.

1. In a browser, go to the Ektron Medical Home page and LOGIN.
2. Go to the Business Rules server control at the bottom of the home page.
3. Hover over the access point and select Edit.
4. Click on New > Add New to create a new rule for rule set number 8.

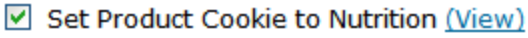
5. Add a new rule to set a cookie if the query string has "?product=nutrition"
   a. Select Conditions. Check and enter the following:


the cookie param equals value
The Custom param equals value
The Form param equals value
The QueryString param "product" equals value "nutrition"
The Server Variable param equals value

   b. Actions for TRUE conditions



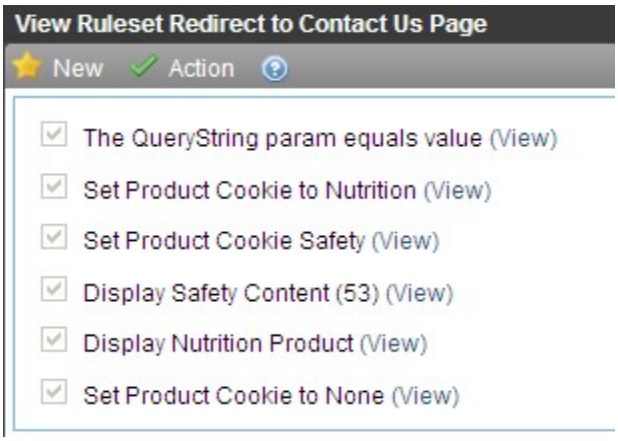
   c. Action for FALSE condition – set nothing
   d. Name of rule



6. Add the following rules in the same manner as above;

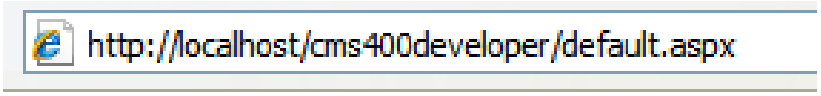
Condition	Action if TRUE	Name
If QueryString param "product" equals value "none"	▪ Display a message "cookie set to none" ▪ Set cookie "product" to value "none"	Set Product Cookie to none
If QueryString param "product" equals value "safety"	▪ Display a message "cookie set to safety" ▪ Set cookie "product" to value "safety"	Set Product Cookie to safety
If cookie param "product" Equals value "safety"	▪ Display Content Block ID "53"	Display Safety Content
If cookie param "product" Equals value "nutrition"	▪ Display Content Block ID "55"	Display Nutrition Content

Now the rule set looks like this:

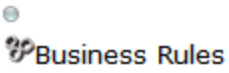

View Ruleset Redirect to Contact Us Page
New
Action
The QueryString param equals value (View)
Set Product Cookie to Nutrition (View)
Set Product Cookie Safety (View)
Display Safety Content (53) (View)
Display Nutrition Product (View)
Set Product Cookie to None (View)

Now to see the results of these rules, do the following

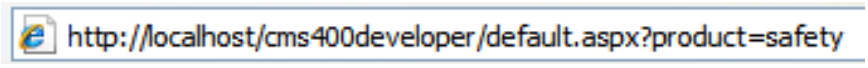
1. Enter this URL to see the current state without cookies set.

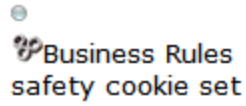
   Notice at the bottom of your web page that the business rules icon looks like this:

2. Enter this URL to see a cookie set for a safety product

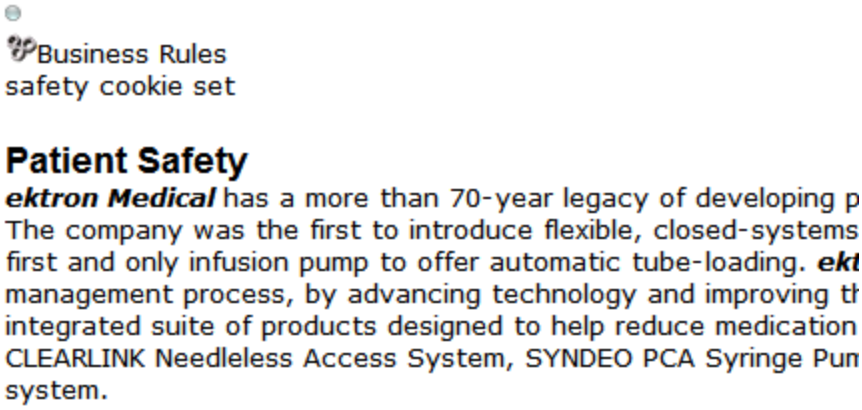
   

   Notice at the bottom of your web page that the business rules icon looks like this:

   Now refresh the page and look at the bottom of the page to see the content that is displayed because the "safety" cookie is found.

   You see this:


Business Rules
safety cookie set
Patient Safety
ektron Medical has a more than 70-year legacy of developing p
The company was the first to introduce flexible, closed-systems
first and only infusion pump to offer automatic tube-loading. ekt
management process, by advancing technology and improving th
integrated suite of products designed to help reduce medication
CLEARLINK Needleless Access System, SYNDEO PCA Syringe Pun
system.

Remember in these exercises the cookie is set when the query string is discovered. The next refresh of the page discovers the cookie and performs accordingly.

3. Now set the cookies to "product=nutrition" and "product=none". See what happens at the bottom of the page.

Unit 27 – Content Rating and Reviews

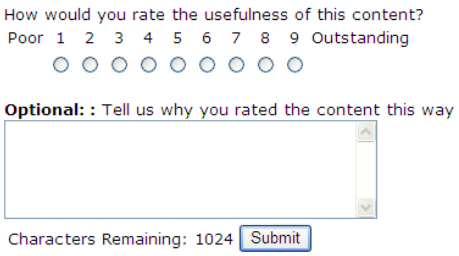
Reference: "Content Rating" chapter in *Ektron CMS400.NET Reference Manual.*

Ektron CMS400.NET provides a rating system, based on stars, so site visitors can rate content on your Web site. A visitor can rate content on a scale of one through five stars. Optionally, half star rating increments can be used and site visitors may be allowed to submit comments.

Note: If a visitor is not logged in as a CMS or membership user, browser cookies must be enabled in order to submit a content rating.

Exercise 27-1: Entering a Content Rating on the Web Page

1. In a browser, select the menu **Conditions > Cancer**.


How would you rate the usefulness of this content?
Poor 1 2 3 4 5 6 7 8 9 Outstanding
Optional: : Tell us why you rated the content this way
Characters Remaining: 1024
Submit

2. Click on the link to the article "The Diet / Cancer Link".
3. Go to the bottom of the page and you will see the content rating area.
4. Choose a rating and enter an optional comment.
5. Click the **Submit** button.
6. Go to the bottom of the article again and notice that the **Rating Level** is displayed now.

Exercise 27-2: Viewing the Content Rating Report

All content rating and review data for a content item is maintained and can be displayed in detail and summary formats.

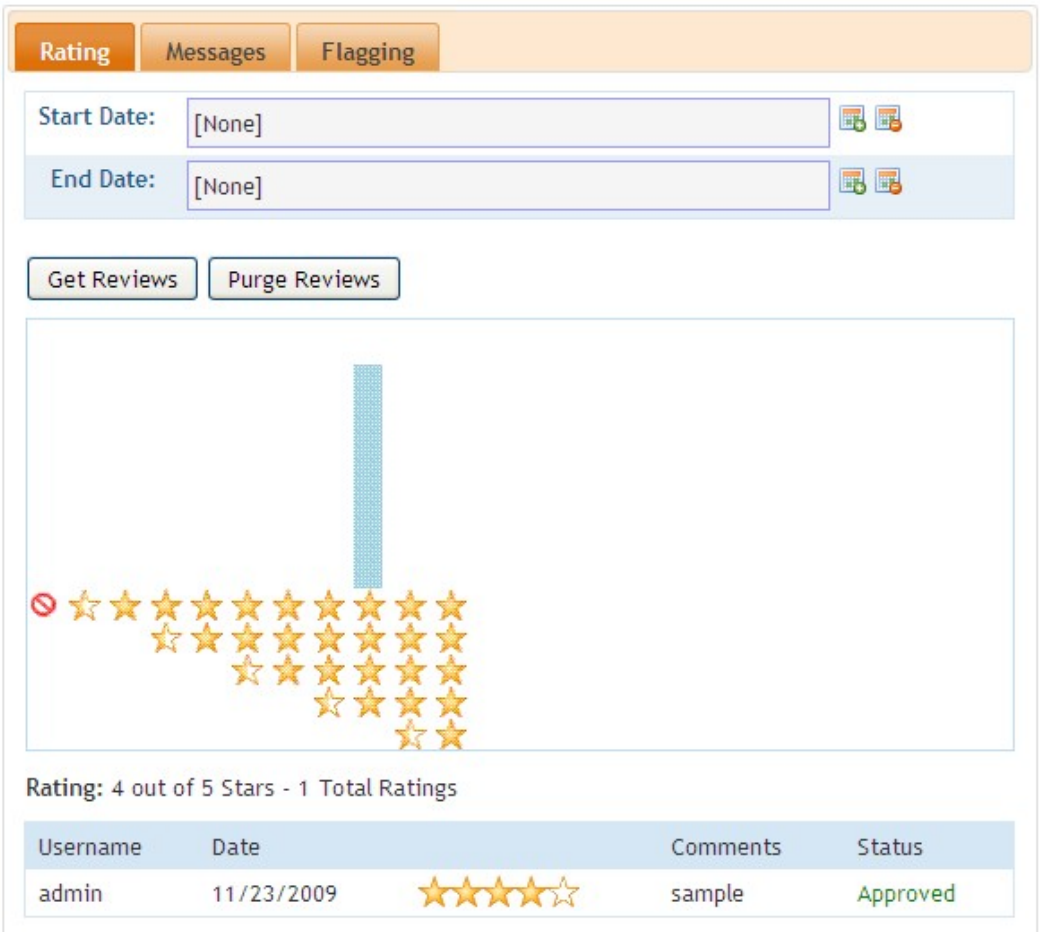
Using the article in the above exercise view the Content Rating report by doing the following:

1. Browse to the content item.
2. Hover on the sliver access point.
3. Select **View Advanced Report**.

Or:

Navigate to the content item in the Workarea:

1. On the Content tab, navigate to the folder that contains the content.
2. Select the content item.
3. Click the **View Rating Reports** toolbar button ( ).
4. To view the detailed rating report, click on the **Get Result** button.


Rating
Messages
Flagging
Start Date:
[None]
End Date:
[None]
Get Reviews
Purge Reviews
Rating: 4 out of 5 Stars - 1 Total Ratings
Username
Date
Comments
Status
admin
11/23/2009
sample
Approved

Unit 28 – Content Flagging

Reference: "Content Flagging" chapter in *Ektron CMS400.NET Reference Manual.*

Flagging Content enables a site visitor to flag content and provide feedback. Administrators can define a list of flags and apply the choices to a folder. Lists can be centered on content that wrong or not appropriate for all viewers. For example:

- Sexually Inappropriate
- Copyright Violation
- Inaccurate

It can also be used to indicate if a content item is above average. This helps organizations to create a recommended content list.

- Loved This Content
- Hated This Content
- I Could Take It or Leave It

Content flagging can spread the moderation of your site to your site visitors. Flagging can also help site visitors feel vested in the site.

Exercise 28-1: Creating Flagging Definitions

To create a flagging definition, follow these steps.

1. In the Workarea, navigate to **Settings Tab > Community Management > Flagging > Flagging Definitions**.
2. Select a language with which the flagging definition will be associated. (Class use English.)
3. Click the **Add** button ( ). The Add Flagging Definition screen appears.
4. Enter a Name and Description for the flagging definition.
5. Click the **Option** button ( ) to add a flag to this flagging definition.
6. Continue to click the Option button to add additional flags.
7. If necessary, change the order of the flags by clicking the **Sorting** buttons ( ).

   If you create a flag you want to remove, click the **Remove** button ( ).
8. Click the **Save** button ( ).

Exercise 28-2: Edit a Flagging Definition

To edit a flagging definition, follow these steps.

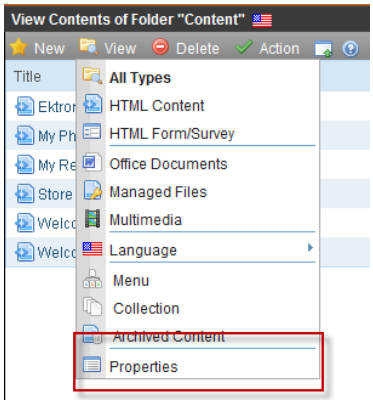
1. In the Workarea, navigate to **Settings Tab > Community Management > Flagging > Flagging Definition**.
2. Click the flagging definition **Name** link or the **ID** link.

3. Edit the available fields.
4. Click the **Save** button ( ).

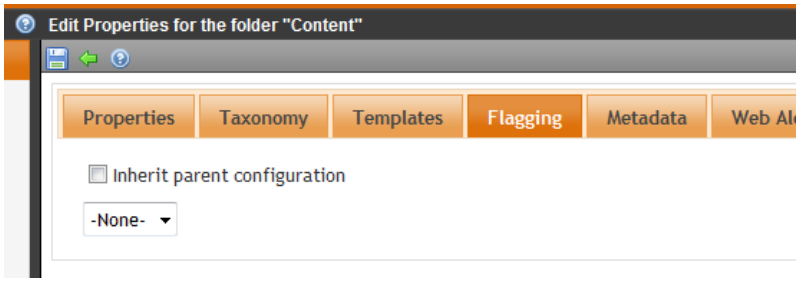
Exercise 28-3: Assigning a Flagging Definition to a Folder

Once you have created a flagging definition, you can assign it to one or more folders. All content in the folders will have the selected flagging definitions applied to it. Follow these steps.

1. Click the **Content** folder bar.
2. Navigate to the folder where the content to be flagged is located.
3. Select **View > Folder Properties** from the View menu. The View Properties screen appears.



4. Click the **Edit** button ( ).
5. Find the **Flagging** area.
6. Make sure the **Inherit Parent Flagging Configuration** check box is not checked.
7. Select an available flagging definition from the Flagging drop down.



8. Click the **Save** button ( ).

Note: Developers add the Content Flagging server control with the dynamic parameter "id" to the templates for flagging to show on the web pages.

Exercise 28-4: Viewing Flagged Content

The Flagged Content areas of the Workarea allow you to view and manage content that's been flagged and the flags themselves. There are three places in the Workarea for flagged content:

- The **Smart Desktop**. This area deals with the most recent content flags associated with any content.
- In the **Settings Tab > Community Management > Flagging > Flagged Content**.
- In **Reports Tab > Contents > Content Flags**.

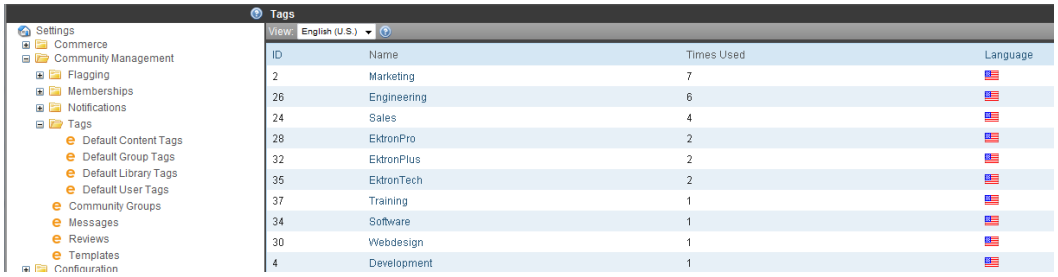
Exercise 28-5: Deleting a Flagging Definition

When you no longer want to use a flagging definition, delete it.

When a flagging definition is deleted, it is removed from all folders with which it is associated.

To delete a flagging definition, follow these steps.

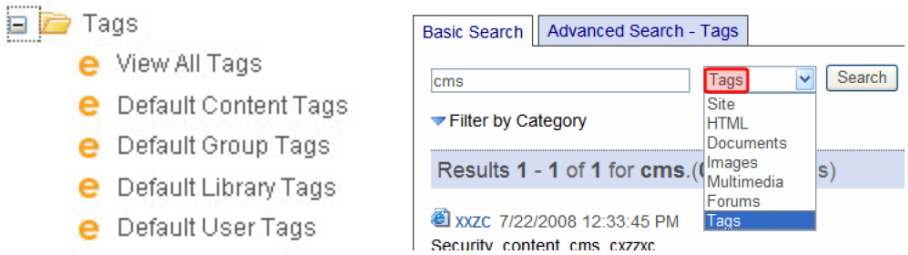
1. In the Workarea, navigate to **Settings Tab > Community Management > Flagging > Flagging Definition**.
2. Click the flagging definition **Name** link or the **ID** link.
3. Click the **Delete** button ( ).



Unit 29 – Tags and Tag Cloud

Tags are keywords that can be assigned to users, groups, content, and library items.

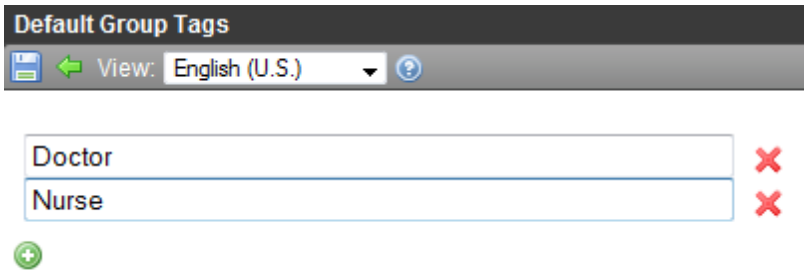
On a Web site, tags for a user or group appear in a profile, helping site visitors to learn about a user or group. Tags can also be searched.



Exercise 29-1: Adding Default Group Tags

The Default Group Tags screen lets you add tags that may be assigned to community groups.

1. In the Workarea, navigate to **Settings Tab > Community Management > Tags > Default Group Tags**.
2. Select a language for the tag. (Class use English.)
3. Add the tags in the empty text box as shown below. If no empty box appears, click the **Add** button ( ) then enter the tag.



Creating Default tags for Users, Content and the Library is done in a similar manner.

Creating User-Created Tags

In addition to applying default tags, users, community group leaders, and content editors can create their own tags. This allows for a more diverse and creative list of tags.

For example, a user is editing content. He reviews the default tags but decides that none are correct. So, he creates and assigns a new tag: Rosebud. That tag is now applied to that content.

Managing Tags

Administrators manage tags from the **Settings Tab > Community Management > Tags** screen.

This screen displays all default and user-created tags. You can filter the list by language.

Click any tag's name to see its details.

Tag Cloud

User Tag Cloud
account_management accountmanager Advertising AlienwareM17x appeng ATV_Riding Baseball Bazinga
BestPractices Boston_MA Boxing Canada CMS400 collaboration Competitive ContentStrategy Cooking
Documentation dotNET Engineering evangelism F1 Fencing Ferrari Fishing Fly_Fishing Football
Healthcare Hockey JQuery London_UK LUGs Maintenance Marketing MembersFirst mid-atlantic
Motorcycles Newcastle_UK NumarkNS7 Online_Community Partners Promotions QA Racing Rally
Rock-Climbing RSM Rugby Sales SalesEngineer SalesEngineers Salesforce_Developer Scouts
SingleMaltScotch Soccer Social_Media Software_Hardware SolutionsEngineer South Southsales Sports Student
Support Suzuki Synergy TradeShows Training UX WebDesign west
Group Tag Cloud
1 account_management Advertising Application_Engineering Architecture ASP_NET Australia awesome
Best_Practices Birthday Book CSR Customer_Advocate Customer_Service DataSecurity Department
Discovery_Phase Documentation eIntranet EktronProjects09 Engineering F1 feedback Finance Football Formula1
Fun Games Healthcare HIPAA Human_Resources HumanResources IT IT_Services management
Marketing Midwest Miniatures New_England Northeast Nurturing Professional_Services
ProjectManagement PSG QA Quality_Assurance Sales Sales_Engineering solutions Support Synergy
Training Travel Tri_State Warhammer Web_Design webinars
Content Tag Cloud
Advertisement Announcements Compliance eIntranet eMOS experience features feedback Healthcare
impression improvement map Marketing Matrix opinion Travel User-Centric Version

DAY 3 OBJECTIVES

Web 2.0 and Social Networking

- Memberships, Users and Groups
- Wiki editing
- Web Alerts
- Calendars
- Blogs
- Discussion Boards
- Geo Mapping
- HTML Forms/Polls and Surveys
- Social Controls – Users and Groups
- Personalization

Advanced Options

- PageBuilder
- Multivariate Testing
- eSync

Building your first Web page

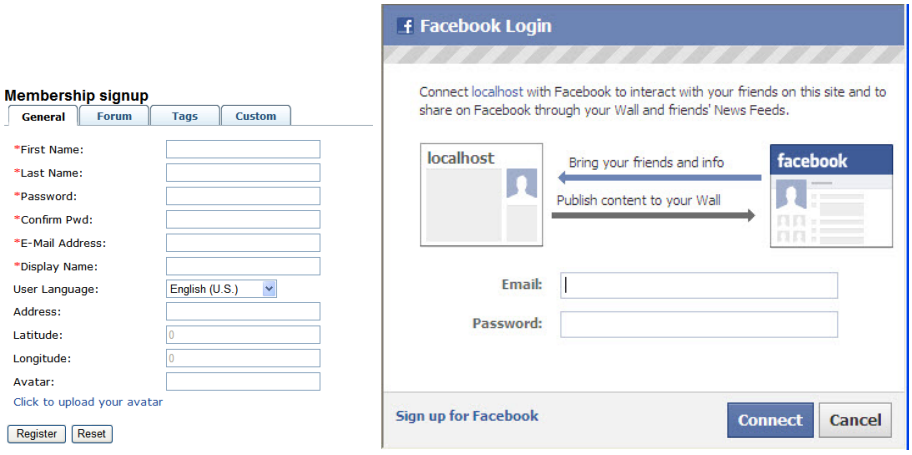
- Creating a CMS400min site
- Workarea folders
- Setting up Visual Web Developer Express
- Master page creation
- Template creation

Unit 30 – Membership Users and Groups

Reference: "Membership Users and Groups" chapter in *Ektron CMS400.NET Reference Manual.*

CMS400.NET enables you to easily add interactivity to your site with Blogs, Discussion Board and Wikis. These are all features enjoyed by Members. Your web site can contain a membership control where new members can signup.

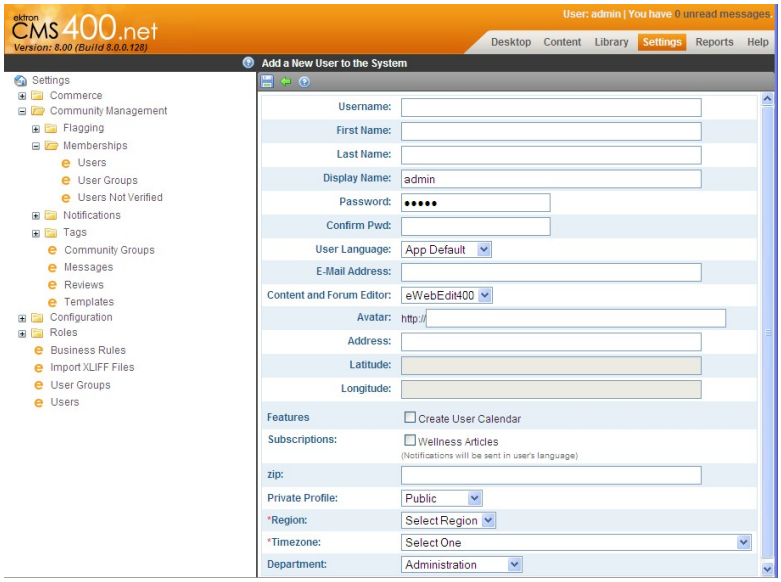
Also, you can include an optional login that authenticates with Facebook accounts.



Exercise 30-1: Adding a Member User from the Workarea

1. In the Workarea, click on the **Settings** tab.
2. Expand the **Community Management > Memberships** view.
3. Click on **Users**. A list of Membership Users appears in the right pane.
4. Click the **Add Membership User** button ( ).
5. Create a Membership User named "Member1" with the password "member1".
6. Click **Save** to add the new Membership User.

7. Create another user named "Member2" in the same manner.



Exercise 30-2: Creating and Populating Membership User Groups

1. Go to **Settings > Community Management > Memberships**.
2. Click on **User Groups** in the left pane.
3. Click the **Add User Group** button ( ).
4. For the User Group Name, enter "Membersgroup1". The Description field is optional.
5. Click the **Save** button ( ). "Membersgroup1" will appear in the User Group Name list.
6. Click on "Membersgroup1" to view users in that group.
7. Click the **Add Membership User** button ( ).
8. Select both "Member1" & "Member2" by clicking on the check box beside the names.
9. Click the **Save** button ( ) to save the member to the member group.
10. Click **OK** in the popup window to add "Member1" & "Member2" to "Membersgroup1".
11. Add another User Group named "Membergroup2".

Exercise 30-3: Removing a Membership User from a Membership Group

1. Click "Membersgroup1" in the group list.
2. Click the user you want to remove from Group1 ("Member1").
3. You see "Member1"'s profile.
4. Click the **Delete** button ( ).
5. Click **OK** in the pop-up window to delete the user.
6. "Member1" is now removed from "Membersgroup1".

Exercise 30-4: Removing Membership User Group

1. Click "User Groups" to view all the user groups.
2. Click the User Group you want to remove ("Membersgroup2").
3. Click **Delete** button ( ). A confirmation window appears.
4. Click **OK** to delete this group

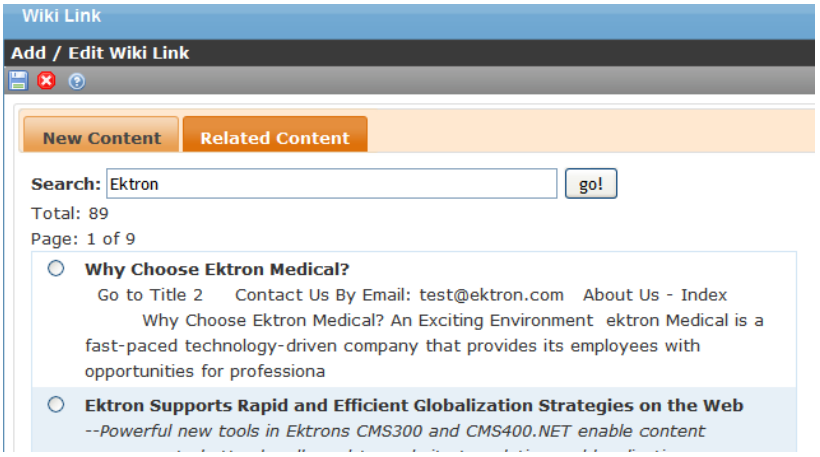
Unit 31 – Wikis

Reference: "Using Ektron CMS400.NET's Wiki Feature" in the *Ektron CMS400.NET Reference Manual.*

The Wiki feature lets registered site visitors (that is, Membership Users) and CMS users insert hyperlinks to other content. The hyperlinks can connect to existing content or to content that doesn't exist yet. If the hyperlink's destination does not yet exist, the Wiki creates both the hyperlink and the new content item to which it jumps. This collaborative authoring style is used in Wiki sites such as Wikipedia (http://en.wikipedia.org), where any author can contribute new content and articles at any time.

Exercise 31-1: Adding a Hyperlink to Existing Content

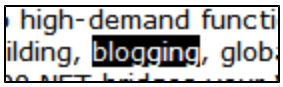
1. Login as the user "Member1".
2. On the Ektron Medical page, select Contact Information > Wiki.
3. Hover over Silver Access Point above the *Title: Ektron Products*.
4. Select Edit from the menu.
5. In the first sentence, select the word "Ektron" by double clicking on the word.
6. Click the "Add Wiki link" button ( ).
7. Click the **Related Content Tab.**
8. Notice the Search term is "Ektron" and it shows the list of search results.


Wiki Link
Add / Edit Wiki Link
New Content
Related Content
Search: Ektron
go!
Total: 89
Page: 1 of 9
Why Choose Ektron Medical?
Go to Title 2 Contact Us By Email: test@ektron.com About Us - Index
Why Choose Ektron Medical? An Exciting Environment ektron Medical is a fast-paced technology-driven company that provides its employees with opportunities for professiona
Ektron Supports Rapid and Efficient Globalization Strategies on the Web
--Powerful new tools in Ektrons CMS300 and CMS400.NET enable content

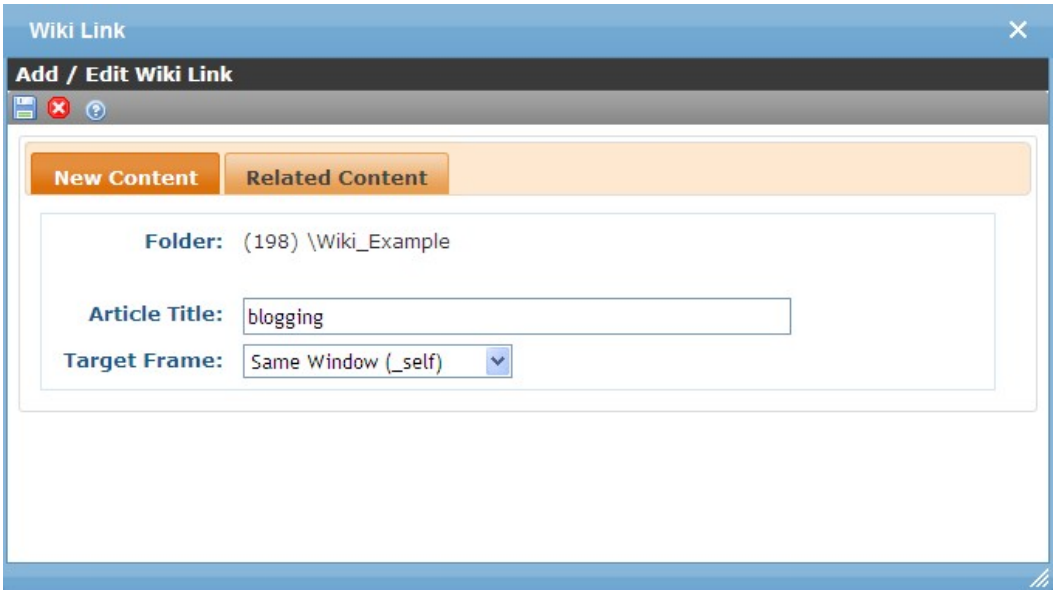
9. Click the Radio Button next to the title of the first article.
10. Click **Add** ( ) to create the hyperlink in the Wiki content.

Exercise 31-2: Creating a Wiki Hyperlink to New Content

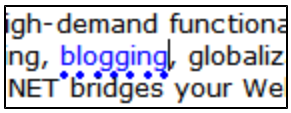
1. Continuing from the previous exercise, edit the content "Title: Ektron Products" again.
2. In the last sentence, select the word “blogging” by double clicking on the word.



3. Click the **Add Wiki Link** button ( ).
4. The **New Content Tab** is the default tab.



5. Click **Add (**) to create new content based on this link.
6. Notice the link points to the new content you just created.

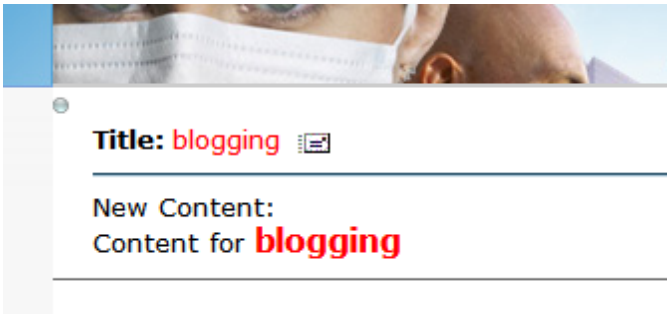


Note: Note: In FireFox browsers, this link is underlined with dots.

7. Click **Publish** to publish the change to this Wiki content.

Exercise 31-3: Editing the New Content (as a Member)

1. On the Wiki page you edited in the previous exercise, click on the link “blogging”.
2. The new page displays. Notice it is just a basic content page with a few words.

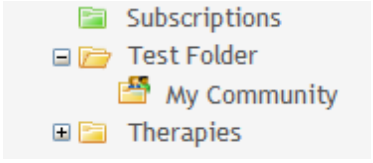


3. Hover over the silver access point and choose Edit from the menu.
4. Edit the content by adding some new content.
5. Select the Category Tab and choose any category.
6. **Publish** it.

Your new content is now published on the site.

Exercise 31-4: Creating a Wiki Folder

1. Go to **Workarea > Content > CMS400Demo >Test Folder**.
2. Right-click on Test Folder and choose Add **Community Folder** ( )
3. Set the Title to "My Community".
4. Click Add Folder ( ).



Now you have a folder for content edited by Community Members.

Best Practice Tips

If you want only specific users to edit the Wiki content, create a special Membership Group and assign edit permissions to that group. Leave the "All Members" group with Read Only permission so that all members can read the Wiki.

Unit 32 – Web Alerts

Reference: "Web Alert Feature" in the *Ektron CMS400.NET Reference Manual.*

Web Alert subscriptions are created in the Workarea and assigned to folders. A legally-compliant web alert must have Opt-Out, Unsubscribe and Default messages. Web alerts must also use a valid e-mail address from the E-mail From List. Web Alerts require setup of the necessary services, which is detailed in the Setup Manual included with CMS400.NET.

[For more information on what a Web Alert is and how to use it, please refer to the Admin Manual – Web Alert Feature.]

[Instructor – note that some sites may require that the Web Alert feature be installed from the Ektron > Utilities menu.]

Exercise 32-1: Creating a Web Alert subscription

1. Click the **Settings** tab.
2. Open the **Configuration** folder.
3. Open the **Web Alerts** folder.
4. Click **Subscriptions**.

5. Click the **Add** button ( ).
6. Enter the Subscription Name "Newsletter".
7. Click the **Enabled** check box.
8. Click the **Save** button ( ).

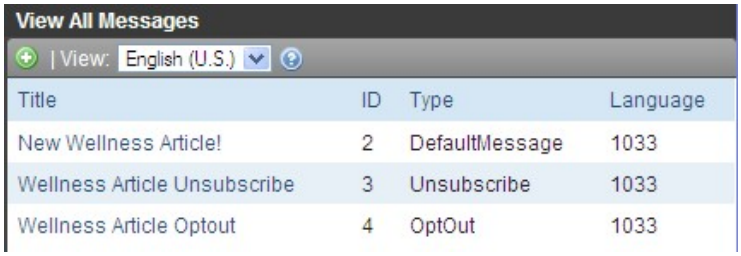
Exercise 32-2: Creating the Messages

1. Under the Web Alerts folder, click **Messages**.
2. Click the **Add** button ( ) to create a new message.
3. Enter "Newsletter OptOut" as the title.
4. Select **OptOut** from the type dropdown.
5. Enter a brief OptOut message such as:

   "*You have received this newsletter because you subscribed to it on the Ektron Medical Web site. If you do not wish to receive similar messages in the future, use the "Unsubscribe" link below."*

6. Click the **Add E-mail Message** button ( ).

7. Repeat steps 2–6 to create a Default message entitled "NewsletterDefault", such as:
   "*Here is the latest newsletter from Ektron Medical!*"
8. Repeat steps 2–6 to create an Unsubscribe messages entitled "NewsletterUnsubscribe", such as:
   "*To unsubscribe from our newsletter, click here.*"


View All Messages
| View: English (U.S.)
Title ID Type Language
New Wellness Article! 2 DefaultMessage 1033
Wellness Article Unsubscribe 3 Unsubscribe 1033
Wellness Article Optout 4 OptOut 1033

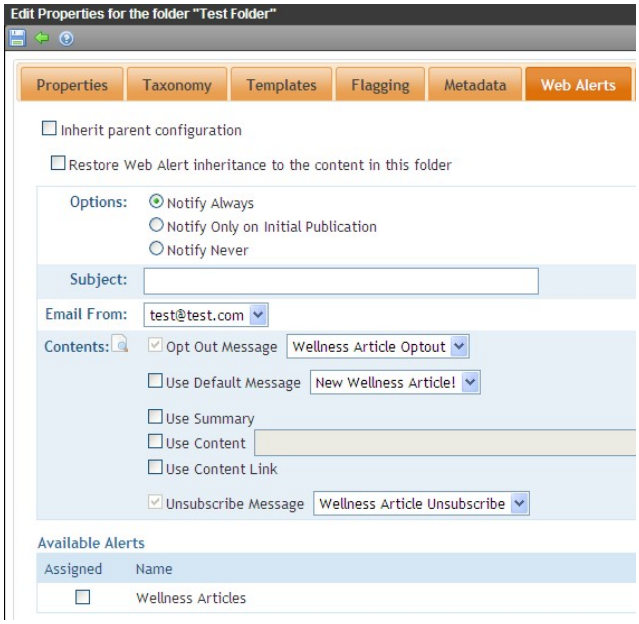
Exercise 32-3: Creating an E-mail From List

1. Under the Web Alerts folder, click **E-mail From List**.
2. Click the **Add New E-mail** button ( ).
3. Enter the e-mail address "newsletter@ektron.com".
4. Click the **Save** button ( ).

Exercise 32-4: Assigning the Web Alert Subscription

1. On the Content tab, expand the "Test Folder" and view the folder properties for the "Announcements" folder.
2. Click the **Edit Properties** button ( )
3. Click the **Web Alerts** tab.
4. Check the **Break Inheritance** box.
5. Set **Notify Only on Initial Publication**.
6. Enter subject: "Newsletter from Ektron Medical"
7. Under **Web Alert Contents**, select the newly-created OptOut, Default and Unsubscribe messages.
8. Under **Available Web Alerts**, assign the "Newsletter" alert to the folder.
9. Click the **Update** button ( ). The "Newsletter" subscription is now available for any con-

tent items in the "Announcements" folder.



Exercise 32-5: Enabling Web Alerts for a User

1. On Settings tab, select **Users**, then your username.
2. Edit the properties as follows:
3. Enter a valid E-mail address that you can readily check.
4. Uncheck the **Disable Receiving of System Notification E-mail** box.
5. Select the appropriate subscription(s).
6. **Save** the new settings.

Exercise 32-6: Testing Web Alerts (Optional)

If Web Alerts are configured and enabled, the functionality can be tested as follows:

1. Create new content in the folder for which Web Alerts are enabled.
2. Publish the content.
3. After a few minutes, have the person to whom the email was sent check their email account.

Unit 33 – Calendars

(Refer to the "Web Calendars" in the *Ektron CMS400.NET Reference Manual*)

Web Calendars in Ektron CMS400.NET perform the same function as a paper calendar - they keep visitors informed about upcoming events. They can be displayed to all visitors to your Web site, and any authorized user can add events to a calendar.

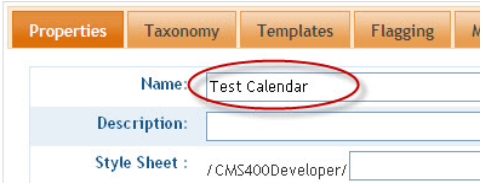
Typical calendar events could include

- company meeting
- reserving a conference room for an interview
- company holidays
- community group events
- personal events
- training dates

Web Calendars allow you to create many calendars for your Web site. Users may add events that are posted for visitors to see.

Exercise 33-1: Creating, Editing, and Deleting a Calendar

1. In the Workarea, go to the **Content** tab and **CMS400demo > Test Folder.**
2. Click **New > Add Calendar**.
3. Under the properties tab, type the name of the calendar called "Test Calendar"

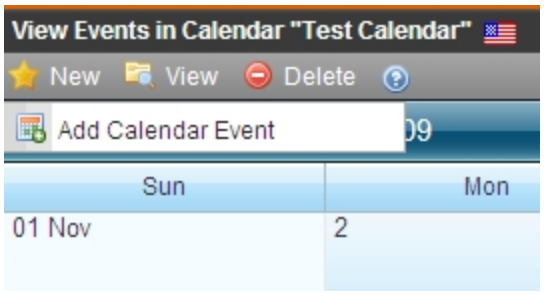


4. Under the template tab, uncheck the **Inherit Parent Configuration** box.
5. Click on **Add a New Template**.
6. Name the template "events.aspx" and select ( ).
7. Select events.aspx as the default template.
8. Click the **Add Calendar** button ( ).
9. Click on the **Test Calendar** folder to view it.
10. Click **View > Properties** to view the properties for this calendar.

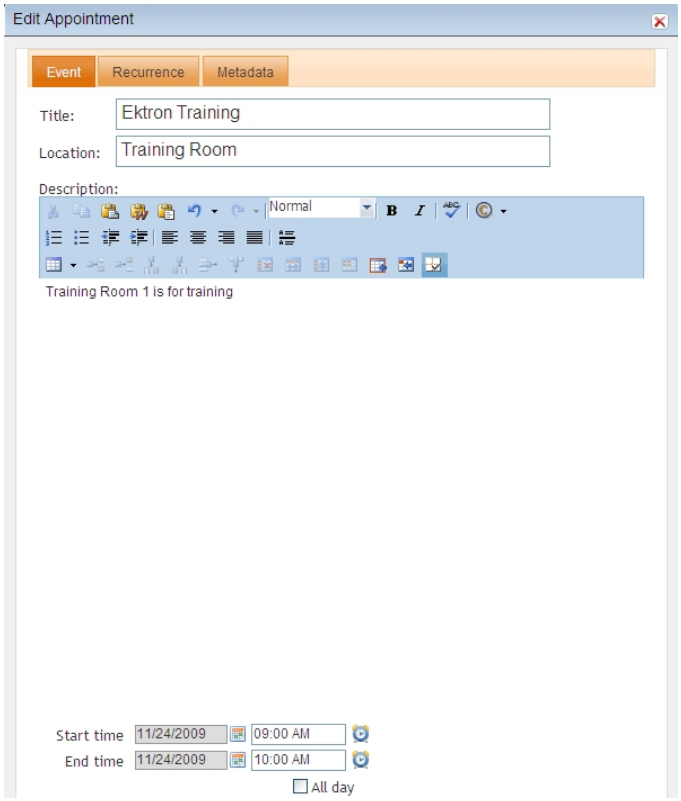
Note: Please write down your Calendar ID number for later in this exercise.

Exercise 33-2: Adding Events to Calendar

1. Go to **Content > Test Folder > Test Calendar**.
2. Click the **New > Add Calendar Event**.



3. Enter the following information:
   Event Title: "Ektron Training"
   Event Location: "Training Room".
4. Enter a brief description.



5. Below the Description select a **Date** and a **Start** and **End** time

   Note: If there is no timeframe for the event, check the box next to "All Day" in the bottom right hand corner of your screen (All day)

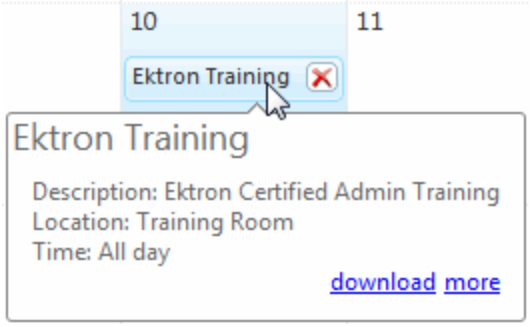
6. Click the save button at the bottom of the screen (Save) to add your calendar event.

7. To view the new Calendar:
    a. Note the ID number of the calendar in test **Calendar > View > Properties**.
    b. In a browser, enter the URL:
    " http://localhost/CMS400Developer/events.aspx?Calid=xx " where xx is the number of the calendar you created.
    (e.g., http://localhost/CMS400Developer/events.aspx?Calid=8)

Note: To create a Recurring Event, click on the Recurring tab when creating the event. Choose a Start & End date for the event. This can only be done when initially creating the event.

Exercise 33-3: Editing and Removing Events from a Calendar

1. Hover over the date and event you want to edit or remove the event from.

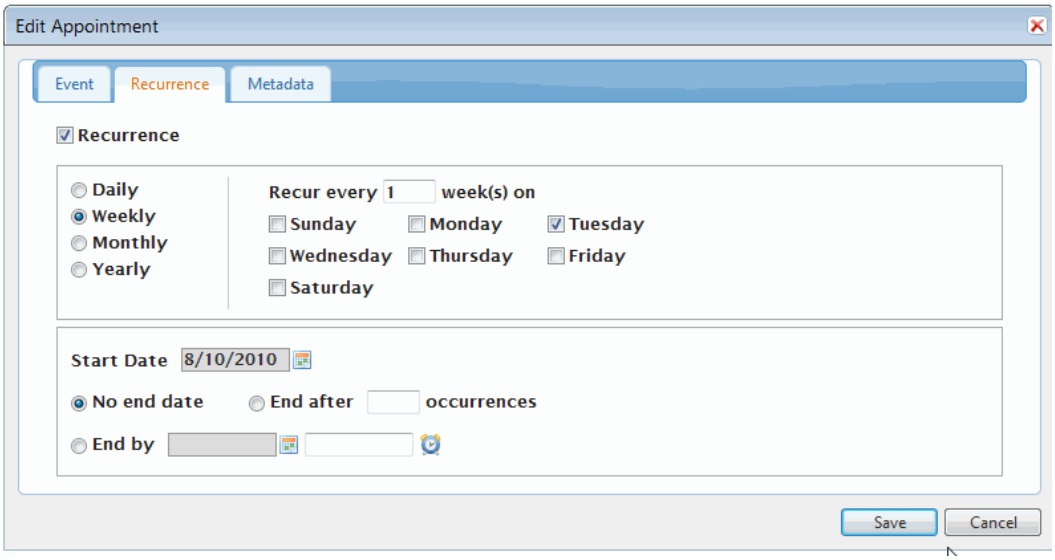


2. To edit **double click** on the event title.

Note: If the event is reoccurring it will ask you to edit this occurrence or the series of occurrences.

3. Change the title to "**Ektron Admin Training**".
4. Click **Recurrence Tab**.
5. Check **Recurrence**.

6. Set **Weekly** ending after **5** occurances as shown below.



7. Click **Save**.

Delete an Event

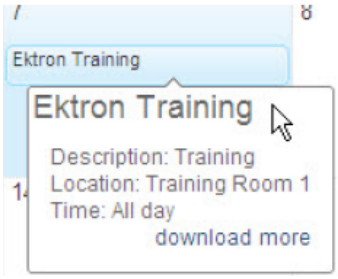
1. To delete, click on the red **X** to the right of the event title to remove it.

2. Hit **Ok**.

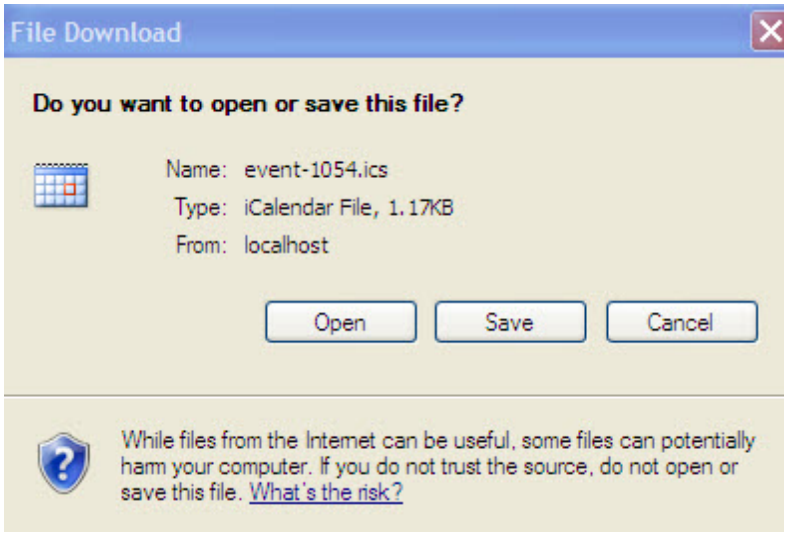
Exercise 33-4: Importing Events to an email client

You can place Web Calendar Events on other Calendar types. The iCalendar Feature produces an .ics file you can import to your calendar.

1. Scroll over the event *Ektron Training*
2. Click on the **download** link.



3. Select **Open** from the download popup to add the event to your Calendar Application such as an Outlook calendar.


File Download
Do you want to open or save this file?
Name: event-1054.ics
Type: iCalendar File, 1.17KB
From: localhost
Open
Save
Cancel
While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?

Unit 34 – Blogs

Reference: the "Blogs" in the *Ektron CMS400.NET Reference Manual.*

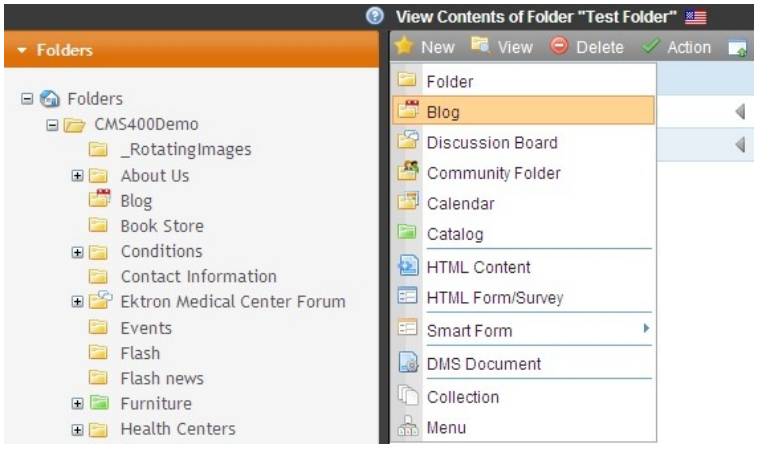
Blogs (short for Web Logs) are a form of online information sharing. A blog is often set up so a group of people can share their thoughts on a subject. One person creates the main post and others comment on it. In addition, Blogs can be used to create an online diary of everyday life.

In the CMS, blogs and blog posts have a similar relationship to folders and content. The Blog is equivalent to a folder and the posts are the equivalent of content items. While blogs and blog post have a few unique properties, for the most part, they work the same as folders and content.

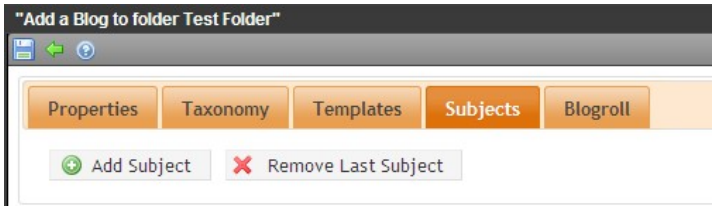
Blogs consist of multiple elements that allow site visitors to view or create a blog post, add comments and see a roll of other associated blogs (the "Blogroll"). If a calendar is present, visitors can see which days have blog posts.

Exercise 34-1: Creating a Blog

1. In the Workarea, click the Content tab and select the "Test Folder".
2. Go to **New > Blog**.

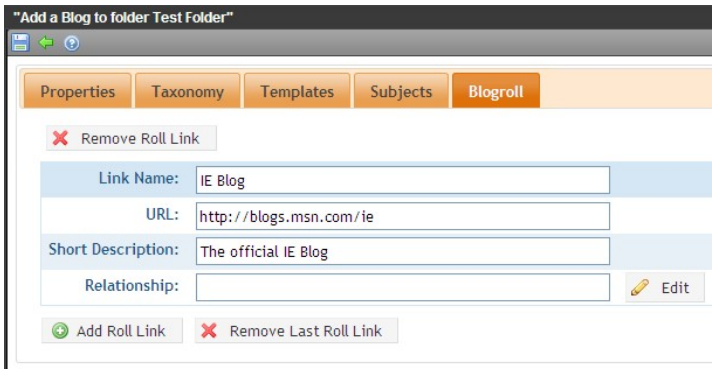


3. Name the **Blog Name**: "Company Blog."
4. Enter the **Blog Title**: "The Official Company Blog".
5. In the Visibility dropdown, select **Public**.
6. Uncheck the **Moderate Comments** and **Require Authentication** options.

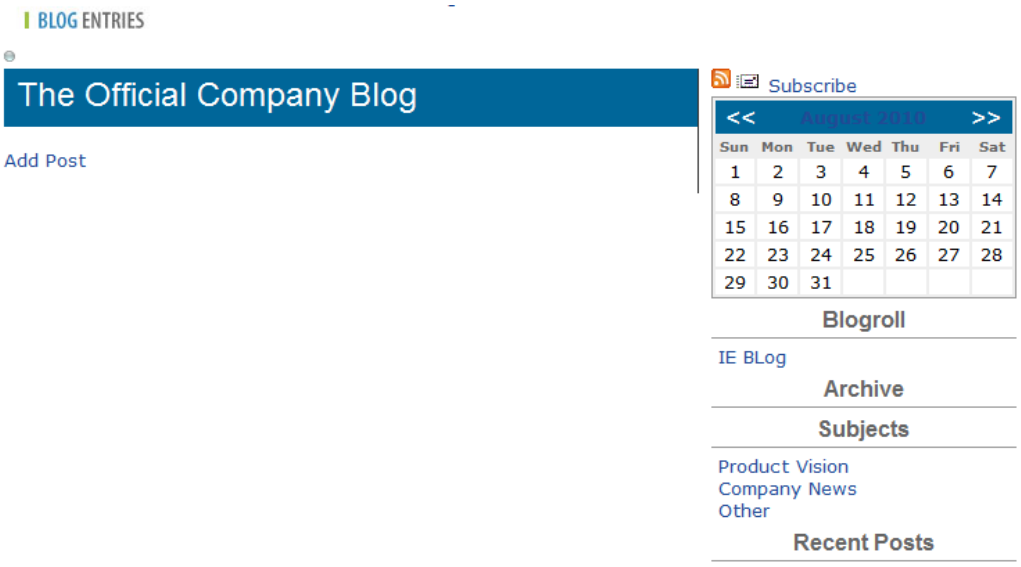


7. Click the **Subjects** tab.
8. Click the **Add New Subjects** link 3 times.
9. Enter the following subjects "Product Vision", "Company News", and "Other"

10. Click the **Blog** Roll tab.
11. Click **Add New Roll Link**.
12. Name the link "IE Blog".
13. Enter the URL: "http://blogs.msdn.com/ie".
14. For the Short Description, enter "The Official IE blog".



15. Click the **Add Blog** button ( ).The Blog is created in the "Test Folder".
16. To view the new Blog:
    a. Under "Test Folder", click on "Company Blog", then View > Folder Properties. Note the ID number of the Blog.
    b. In a browser, enter the URL:
    " http://localhost/CMS400Developer/blogs.aspx?blogID=xx " where xx is the number of the blog you created.
    (e.g., http://localhost/CMS400Developer/blogs.aspx?blogID=214)
17. The empty blog will appear with the **Add Post** link.
18. Click **Add Post** and create a post with the title "Test Blog Post".
19. Enter some text.
20. Select the **Summary** tab and check one or more of the Subjects.
21. Click **Publish**. The new post will appear.
22. To the right of the new blog, you will see **Blogroll** under the calendar. Beneath it you will see a link for the IE Blog you created. Clicking on the link will take you to the IE Blog.


BLOG ENTRIES
The Official Company Blog
Add Post
Subscribe
<< August 2010 >>
Sun Mon Tue Wed Thu Fri Sat
1 2 3 4 5 6 7
8 9 10 11 12 13 14
15 16 17 18 19 20 21
22 23 24 25 26 27 28
29 30 31
Blogroll
IE BLog
Archive
Subjects
Product Vision
Company News
Other
Recent Posts

Unit 35 – Discussion Boards

Reference: the "Discussion Boards" in the *Ektron CMS400.NET Reference Manual.*

The Discussion Board feature provides an opportunity for topic discussions on your Web site. A site or membership user with Add Topic permission creates a topic and posts a starter question. Site visitors can then reply. An example of a Discussion Board is below. As you can see, the first screen has general topics, the second screen's topics are more specific, and a third screen displays posts to the forum.

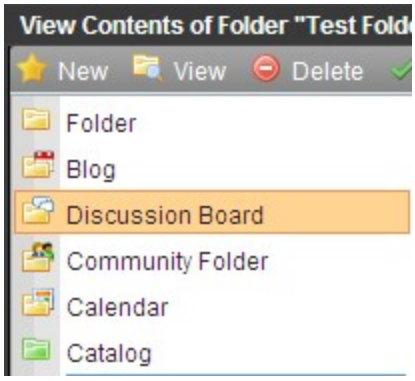
New Discussion Board Message Type

Discussion Board messages can now be generated when a forum post is reported. The new message type is ReportForumPost.

Exercise 35-1: Creating a Discussion Board

Discussion boards consist of two parts. The category and forum structure is set in the Workarea. The topics and replies are user-contributed. Topics and replies can be moderated in the Workarea or in the forum itself.

1. In the Workarea, click the Content tab.
2. Select the "Test Folder".
3. Go to **New > Discussion Board**.

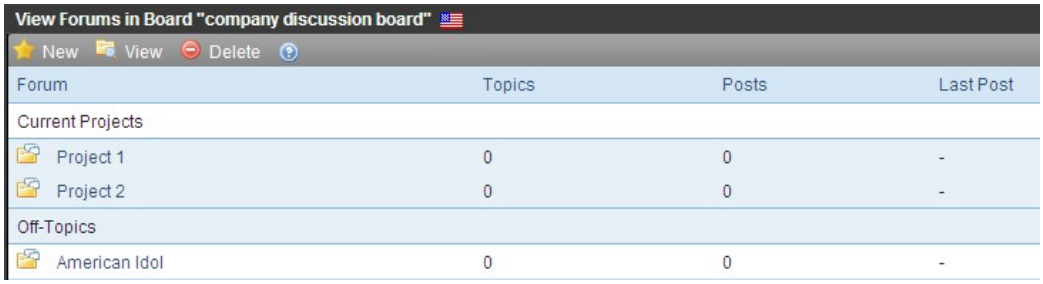


4. For the **Board Name**, enter "Company Discussion Board".
5. For the **Board Title**, enter "Discussions about Company projects".
6. Uncheck the **Require Authentication** box.
7. For the **CSS Theme**, select Standard.
8. In the **Templates** tab, select "forum.aspx".
9. Click the **Subjects** tab.
10. Click the **Add New Subjects** link 2 times.

11. Enter "Current Projects" and "Off-Topic" as categories.
12. Click the **Add Discussion Board** button ( ).

Exercise 35-2: Adding Forums to the Board

1. Under the "Test Folder", click on "Company Discussion Board".
2. Go to **New > Discussion Forum**.
3. Name the forum "Project 1".
4. In the **Subjects** dropdown, select "Current Projects".
5. Click the **Add Discussion Forum** button ( ).
6. Create another new forum called "Project 2" and set the Subject to "Current Projects".
7. Create a third new forum called "American Idol" and set the **Subject** to "Off-topic" category. The result should look like this:



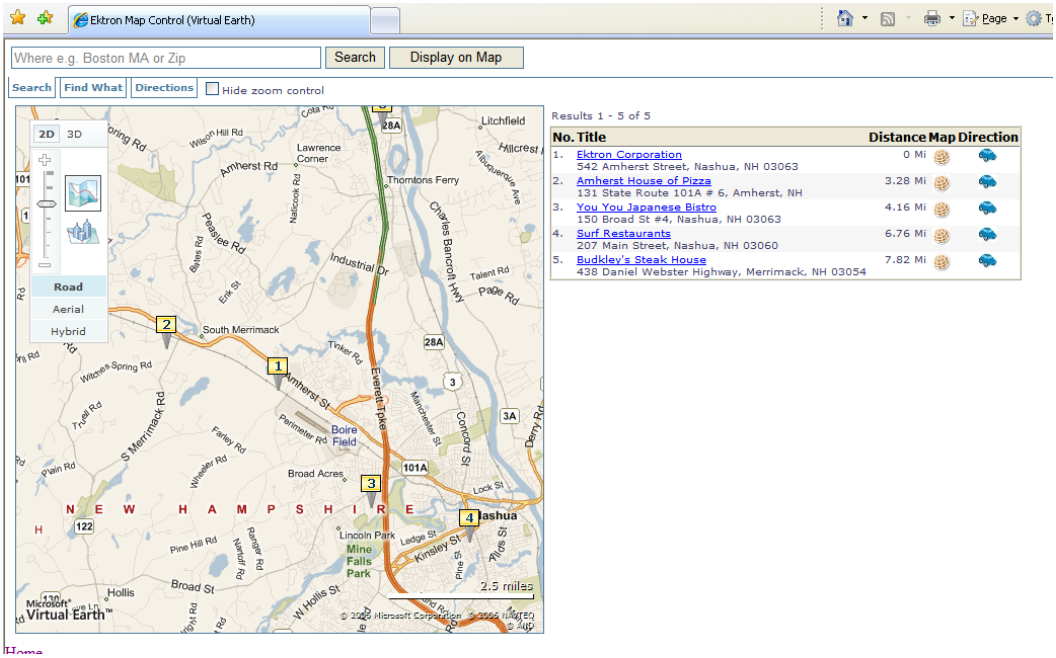
8. To view the new Discussion Board and Forums:
   a. Under "Test Folder", click on "Company Discussion", then view its properties.
   b. Note the ID number.
   c. In a browser, enter the URL:
      "http://localhost/CMS400Developer/forum.aspx?boardID=xx " where xx is the number of the Discussion Board you created.

      (e.g., http://localhost/CMS400Developer/forum.aspx?boardID=216)
   d. The empty "Company Forum" will appear with the Forum Categories and Forums you created.
   e. Click on "American Idol".
   f. Click the **New Topic** button.
   g. Enter "What do you think of this season's singers?" as the title and enter some text in the Message field.
   h. Click **Post**. The new post will appear. You can click on the link to view it.

Unit 36 – GeoMapping

Reference: "Geo Mapping" chapter in *Ektron CMS400.NET Reference Manual.*

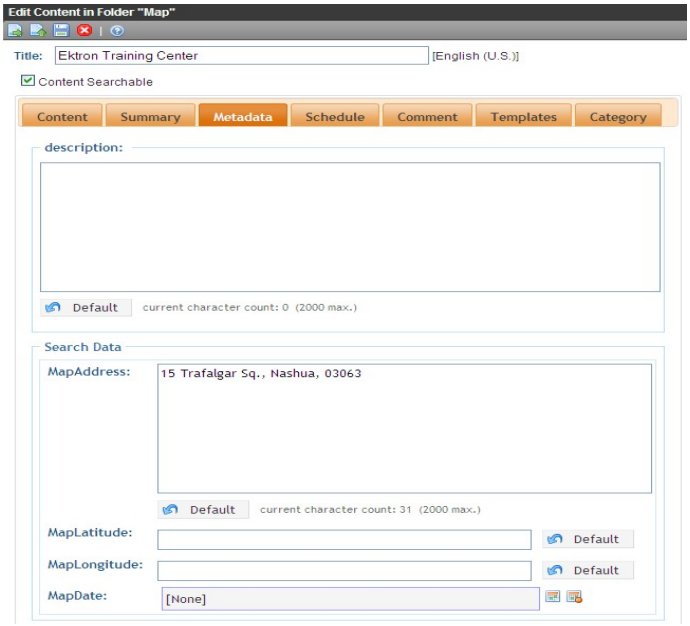
CMS400.NET allows the use of internet-based mapping services to add mapping-related functionality to a Web site.



Exercise 36-1: Marking a Location on a Map.

1. In the Workarea, click the **Content** tab.
2. Navigate to the **CMS400Demo > Map folder**.
3. In the **CMS400Demo > Map** folder, click on **New > HTML Content**.
4. Enter a title for the new location.

5. Select the **Metadata** tab and enter the information shown:



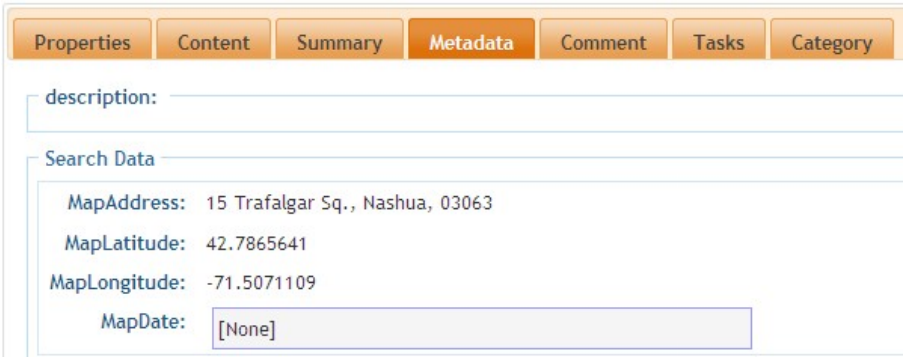
6. Select the **Category** tab
7. Check the "Business" category.
8. Click **Publish**.

When you view the map, there will be a marker at the location. To see the results, view the map in a browser at **CMS400Demo > Contact Information > Map-VE**.

Exercise 36-2: Automatic lookup of MapLatitude & MapLongitude

Note: When you published the above content item, CMS400.NET automatically determines the location's latitude and longitude.

1. Select the "Ektron Training Center" content item from the "Map" content folder.
2. Select the **Metatdata** tab and note the **Search Data** fields.
3. To see the results, view the map in **CMS400Demo > Contact Information > Map-VE**.



Unit 37 – Creating HTML Forms / Polls / Surveys

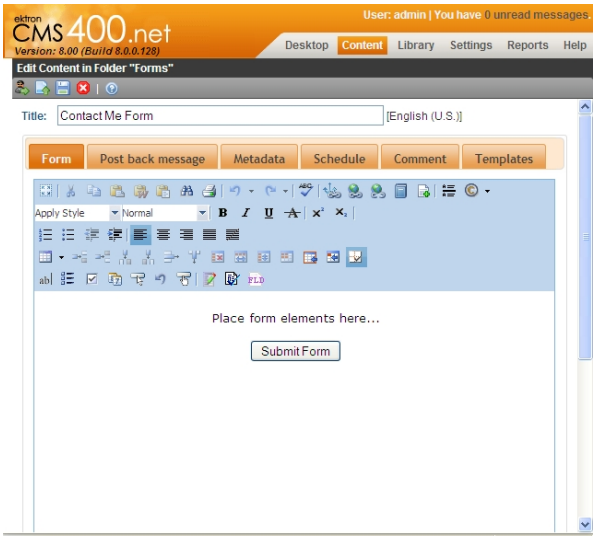
Reference: the "Working with HTML Forms" in the *Ektron CMS400.NET Reference Manual.*

Forms, Polls and Surveys allow you to collect specific information from the visitors to your site. They can be very useful for creating mailing lists and obtaining feedback on various topics.

Note: .NET 2.0 only allows one form per page.

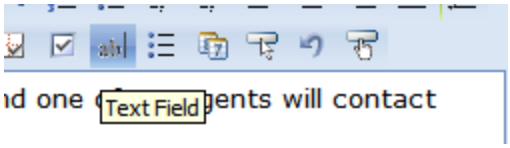
Exercise 37-1: Creating a Form

1. Click on **Workarea > Content tab**, select the "Test Folder".
2. Create a new folder named "Forms".
3. Remove "Inherit Parent Template" and assign "contactinformation.aspx" as the default template.
4. Select the folder **Test Folder - Forms**.
5. Go to **New > HTML Form/Survey**. Note the 5 step indicator in the tool bar.
    a. Select **Blank Form**, then click the **Next** button.
    b. Enter title "Contact Me form", then click the **Next** button.
    c. Leave the **Assign Task** as unassigned and click the **Next** button.
    d. Leave the default post back message; we'll make changes to it later. Click the **Next** button.
    e. The setup is complete. Click the **Done** button. You will have an empty form like the following figure:



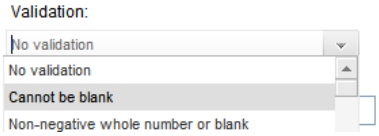
6. Highlight "Place form elements here…" and remove it.

Note: Do not use the BACKSPACE key to remove the text – this will cause a browser action to go to previous page.



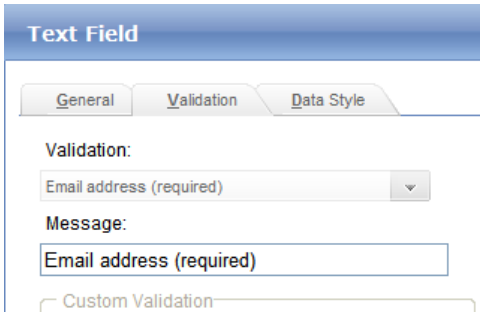
7. In the first line of the design area, enter "Please enter your contact information below and one of our agents will contact you."
   Notice the form fields are located on the bottom tool bar to the right starting with the Text Field.
8. Press <Enter> to go to the next line.
9. Enter "Your Name: ".
10. Add a **Text Field** by double-clicking the **Text Field** icon ( ).
11. In the popup window, enter the fields of information as follows:
    Descriptive Name: "Name",
    Field Name: "name"
    Tool Tip Text: "Please enter your name"

12. Select the **Validation** Tab and set it to **Cannot be blank**.

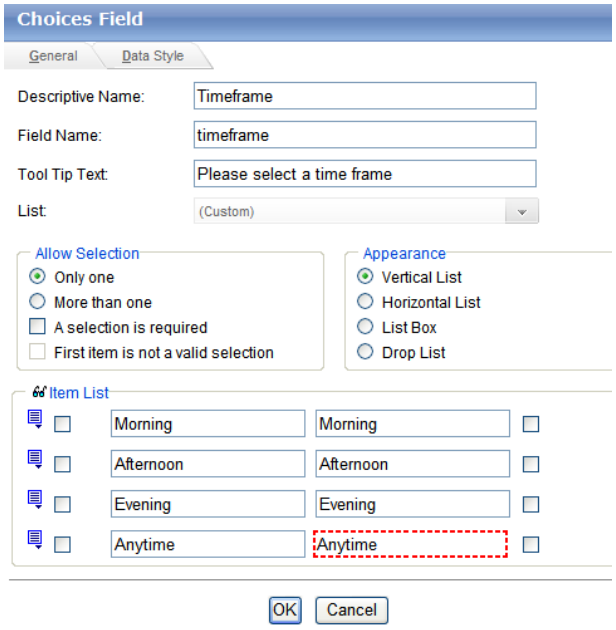


13. Click **OK**.
14. Press <Enter> to go to the next line.
15. Enter the text "Your Phone:"

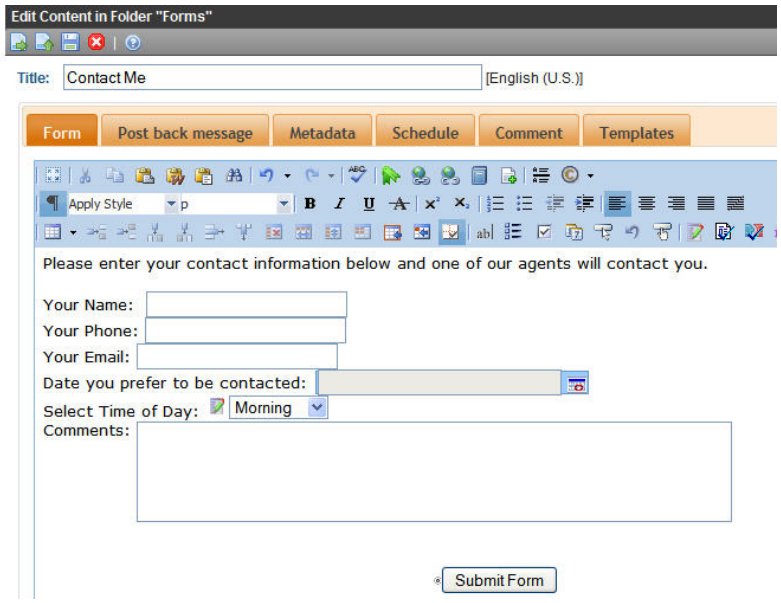
16. Add another Text Field to the right of the text.Pl
Descriptive Name: "Phone"
Field Name: "phone"
Tool Tip Text: "Enter your phone number"
17. Choose the **Validation** tab. Set the **Validation** to **Telephone Number (US & Canada) (required)**.
18. Click **OK** .
19. Press <Enter> to go to the next line
20. Enter "Your e-mail: ".
21. Add a **Text Field**.
22. Add another text field to the right of the text.
Descriptive Name: "Email"
Field Name: "email"
Tool Tip Text: "Enter your email address"
23. Choose the Validation Tab. Set the **Validation** to **E-mail address (required)**.



24. Click **OK** .
25. Press <Enter> to go to the next line.
26. Enter "Date you prefer to be contacted: "
27. Add a Calendar Field.
Descriptive Name: "Date"
Field Name: ContactDate
Tool Tip Text: "What date do you wish us to call?"
Default Value: (Leave blank)
28. Choose the **Validation** Tab. Set the **Validation** to **Cannot be blank**.
29. Click **OK** and go to the next line.
30. Enter "Select time frame: "
31. Add a Choices Field ( ).
Descriptive Name: "Timeframe",
Field Name: "timeframe"
Tool Tip Text: "Please select a time frame"



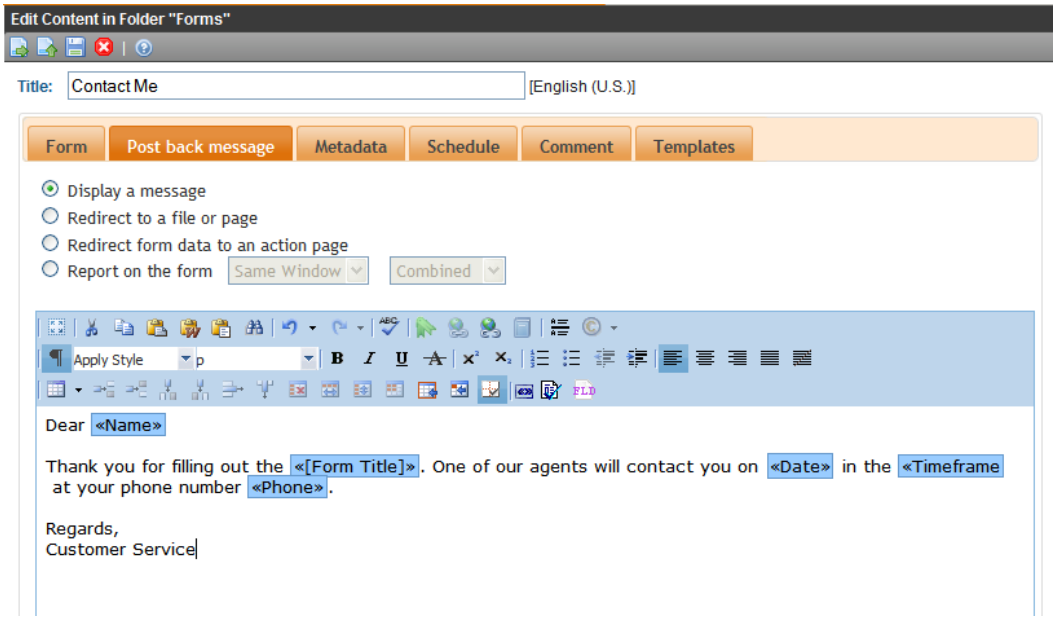
32. Add items to the Item list: "Morning", "Afternoon", "Evening". (Use the +Option button (Option) to add fields to the list.)
33. Choose **Appearance - DROP LIST**.
34. Click **OK** and go to the next line.
35. Enter "Comments:"
36. Add a **Text Field**.
    Descriptive Name: "Comments",
    Field Name: "comments"
    Tool Tip Text: "Please enter your comments"
37. Set the Dimensions Width to **60** characters and Height to **4** characters.
38. Leave the **Validation** as **No validation**.
39. Click **OK**.
40. The form looks like this.



Exercise 37-2:
Creating a Post Back Message

1. With the form open for edit, click on the **Post back message** tab.
2. Choose **Display a message**.
3. Delete "Place post back message here…" in the design area.
4. Enter the post back message as shown below.

Note: NOTE: Click the **Note: Merge fieldNote:** button (**Note:**) to choose fields from the form to enter.



5. The fields in blue boxes can be added by selecting the field in the Merge Field dropdown shown:

6. Publish your new form.

Exercise 37-3: Changing Form Properties (Optional)

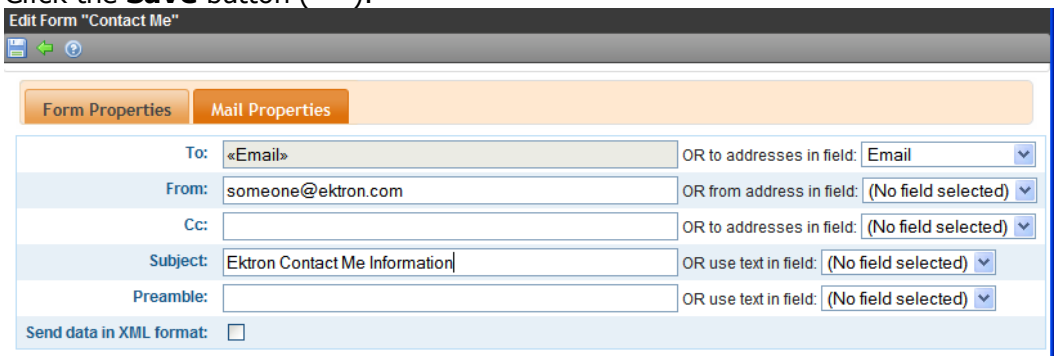
1. From the View Form "Contact Me" page, click the **Edit Properties** button ( ).

   Note: This button is different from the Edit button.

2. Select the **Mail Properties Tab**.
3. Choose the Mail Properties tab.
4. Select E-mail from the drop down list associated with the **To:** field. This is the e-mail that the visitor to the site is going to enter.

   Note: If you didn't select the validation E-mail address (required) for the e-mail field during the creation of the form, you won't see the drop down list.

5. In the **From:** field, type "someone@ektron.com".
6. In the **Subject:** field, type "Ektron Contact Me Information".
7. Click the **Save** button ( ).



8. To view the new form:
   a. Click on "Test Folder" and note the ID number for the "Contact Me" form.
   b. In a browser, enter the URL:

" http://localhost/CMS400Developer/contactinformation.aspx?ekfrm=xx "
where xx is the number of the form you created.
(e.g., http://localhost/CMS400Developer/contactinformation.aspx?ekfrm=868)

c. The "Contact Me" form page will appear.

9. Enter the information and click the Submit Form button. Your post back message will be displayed.

Exercise 37-4: Creating a Poll

1. On the **Content tab**, select the folder "Forms" beneath "Test Folder".
2. Go to **New > HTML Form/Survey**.
3. **Choose Standard Poll** (which has a 4 step setup process), then click the Next button.
4. **Enter a Title "Favorite Dinner Food"** and **Description** "Dinner poll". Click the **Next** button.
5. Enter the **Question** for the poll "What food do you like best for dinner?"
6. Enter the **Choices** that you wish to see on the poll. then click the **Next** button. The setup is complete.
7. Click the **Done** button.
8. Click **Publish**.

To view the new Poll:

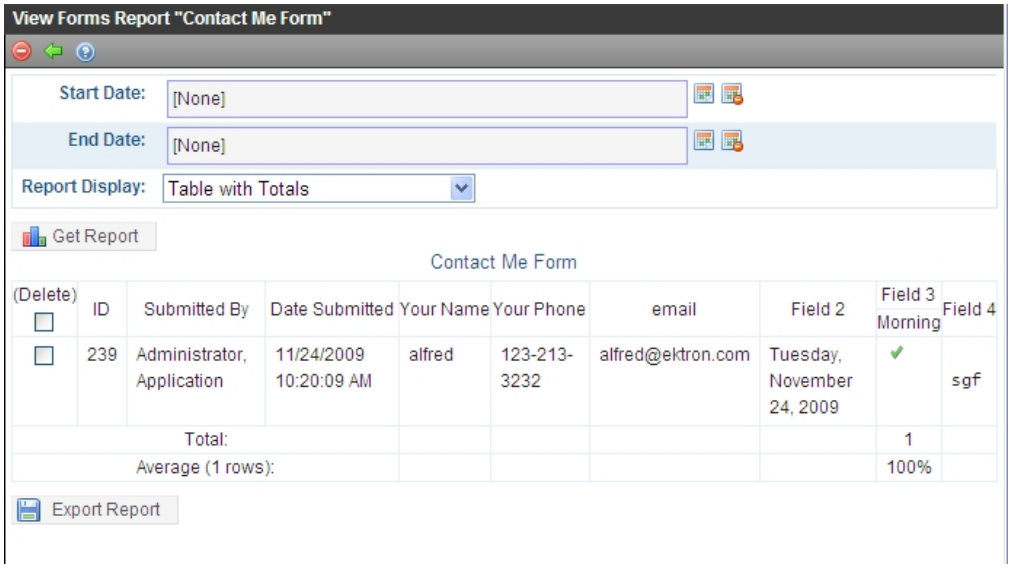
1. Click on "**Forms**" and note the ID number for the Poll.
2. In a browser, enter the URL:
   "http://localhost/CMS400Developer/contactinformation.aspx?ekfrm=xx "where xx is the number of the poll you created.
   (e.g., http://localhost/CMS400Developer/contactinformation.aspx?ekfrm=870)
   The poll page will appear.
3. Answer the questions and click the **Vote** button. The poll results will be displayed.

Note: Note: For Polls & Surveys, you can limit how many times visitors can vote or submit. Go to Edit Properties, check Limit submissions and set the Number of submissions to the desired amount.

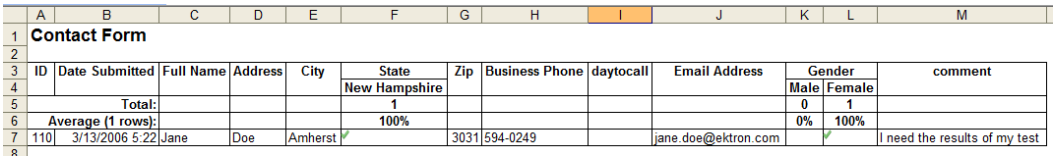
Exercise 37-5: Exporting HTML Form data

1. Click on the **Content** tab then select the folder "Contact Information".
2. Click on the form "Contact Form" to view it.
3. Click on the **Report** ( ) button to see the Forms Report.
4. Select the "Table Of Values" Report Display and click the **Get Report** button.

5. Click the **Export Report** button.



Save the new spreadsheet on your desktop.



	A	B	C	D	E	F	G	H	I	J	K	L	M
1	**Contact Form**												
2													
3	ID	Date Submitted	Full Name	Address	City	State	Zip	Business Phone	daytocall	Email Address	Gender		comment
4						New Hampshire					Male	Female	
5		Total:				1					0	1	
6		Average (1 rows):				100%					0%	100%	
7	110	3/13/2006 5:22	Jane	Doe	Amherst	✓	3031	594-0249		jane.doe@ektron.com		✓	I need the results of my test
8													

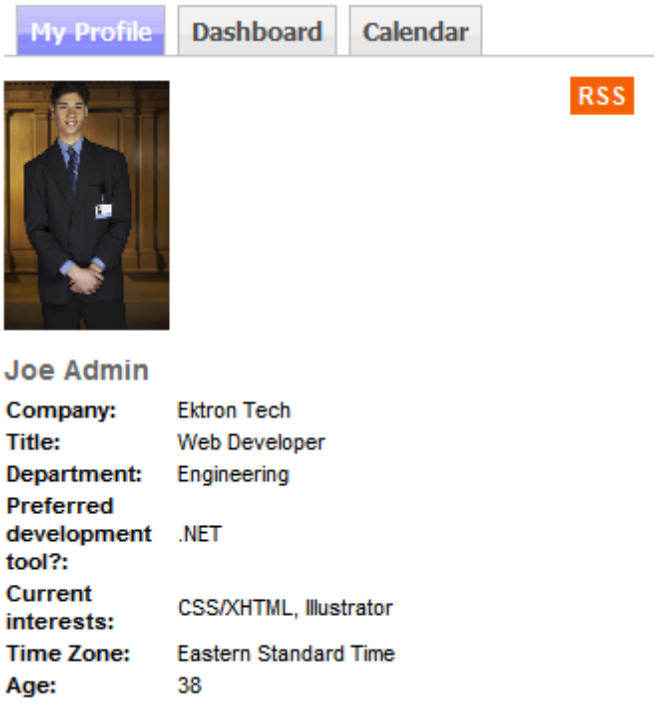
Unit 38 – Social Networking Controls

The Community Platform provides easy collaboration between colleagues and groups. Ektron CMS400.NET users and administrators can access their pages.

When a person signs up to be member, they define information about themselves. Additionally, they can create Blogs; create comments for others to read; create documents, links, and Photo Gallery images.

Additionally, a CMS400.NET user or member can create Groups to which they can invite others to join and participate by sharing documents and blogs and other objects that enhance collaboration within the enterprise.

Social Networking Page (Business Colaboration) from the EktronTech Starter Site.



Unit 39 – Generating email When Community Activities Occur

Ektron CMS400.NET's Community Feature can generate email when a user completes an activity. For example, if a member posts a comment to a community message board, group members who signed up for email notification in their user profile receive an email that contains the comment. Recipients can reply to the email. Replies are posted on the community group's message board.

You can also enable the attachment of files to email notifications. So, if a group manager uploads a PDF file to a group message board, the email notification message contains the PDF file as an attachment. Users can reply to that message and, if they attach an updated version of the file, it can replace the file on the group's message board.

Finally, you can set up an email address for a group. This makes it easy for anyone to broadcast a message to all group members.

Step One: Enter Sending Email Address Information

Important: You must have permission to edit files on the Ektron CMS400.NETserver to complete this step.

The site root/web.config file collects the outgoing email address information. To define the "From:" address of community email sent from your Web site, follow these steps.

1. On the server that hosts your Web site, open the site root/web.config file with a text editor (such as Notepad).

2. Find the section below the <notificationAgent> <providers> elements.

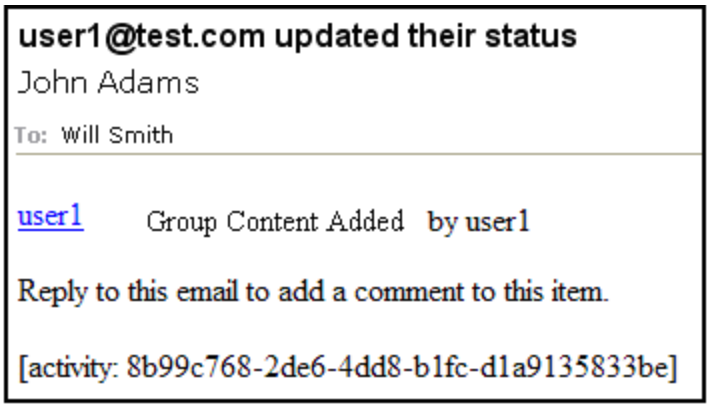
3. Define the elements in the following table. Do not change other elements in that section.

Field	Description
smtpServer	Enter the name of the server that hosts your Ektron CMS400.NET Web site.
smtpPort	Enter the port that sends outgoing email from the site.
username	Optionally, enter the username to authenticate against the smtp server.
password	Optionally Enter the password to authenticate against the smtp server.
from Email	Enter the "from" email address of all outgoing community email. When a recipient gets an email, this value appears in the From: field.

Step 2: Review the Community Activity Notification Message

Ektron CMS400.NET provides a message that is emailed when each community activity is completed. To view the message in the Ektron CMS400.NET Workarea, choose Settings > Community Management > Notifications > Messages and click Email Message Reply.

Here is a sample message.


user1@test.com updated their status
John Adams
To: Will Smith
user1 Group Content Added by user1
Reply to this email to add a comment to this item.
[activity: 8b99c768-2de6-4dd8-b1fc-d1a9135833be]

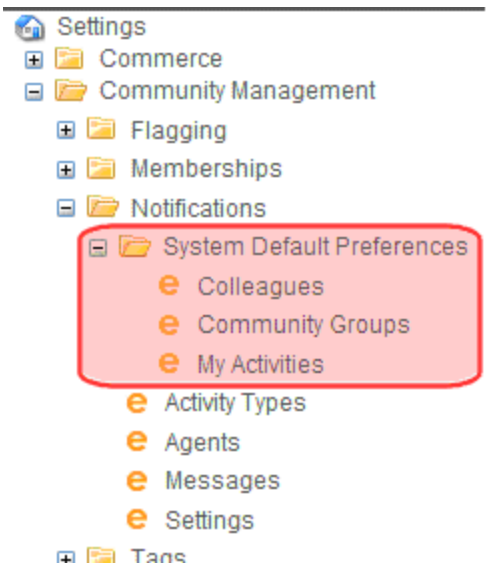
You can modify the message as described in Notification Messages.

Step Three: Set Up email Preferences

Ektron CMS400.NET provides a default set of Notifications that apply to all newly-created users. After a user is created, he can change his preferences by editing his profile, selecting the Activities tab, and checking or unchecking activities and agents.

Similarly, a community group member can access any community group profile and click Edit Group Notification Preferences to set the group's preferences.

You can apply three types of default settings via screens on the Workarea Settings tab (illustrated below).



Notification of colleagues' activities

Notification of community group activities

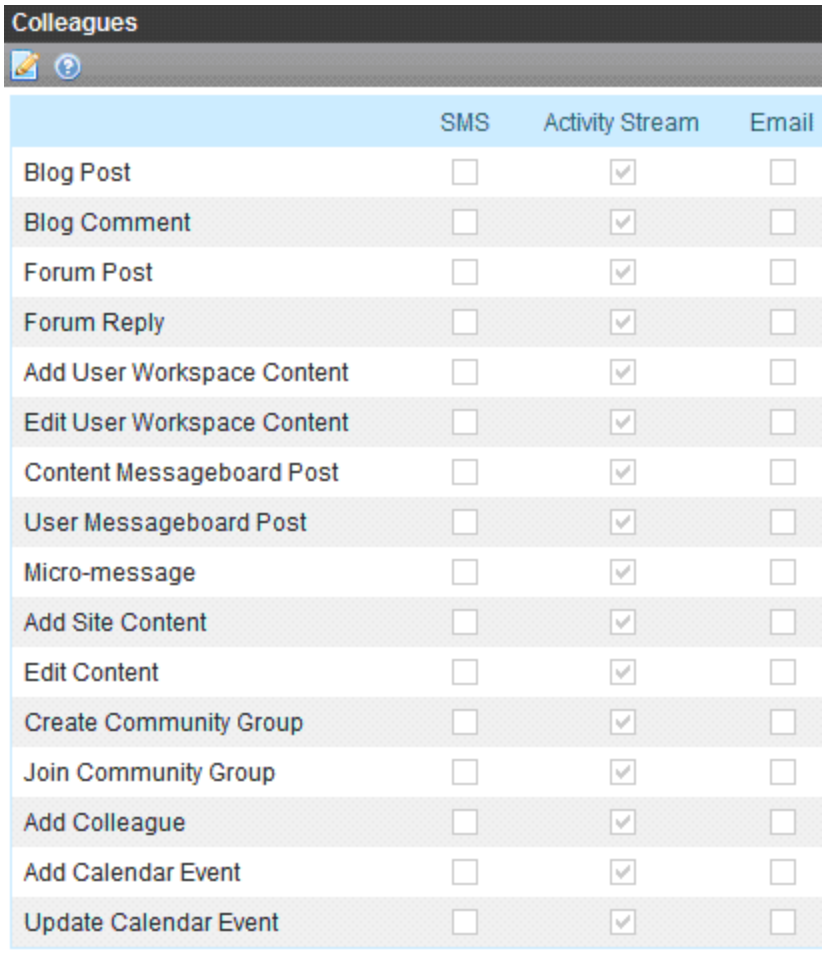
Notification of your activities to other users or community groups

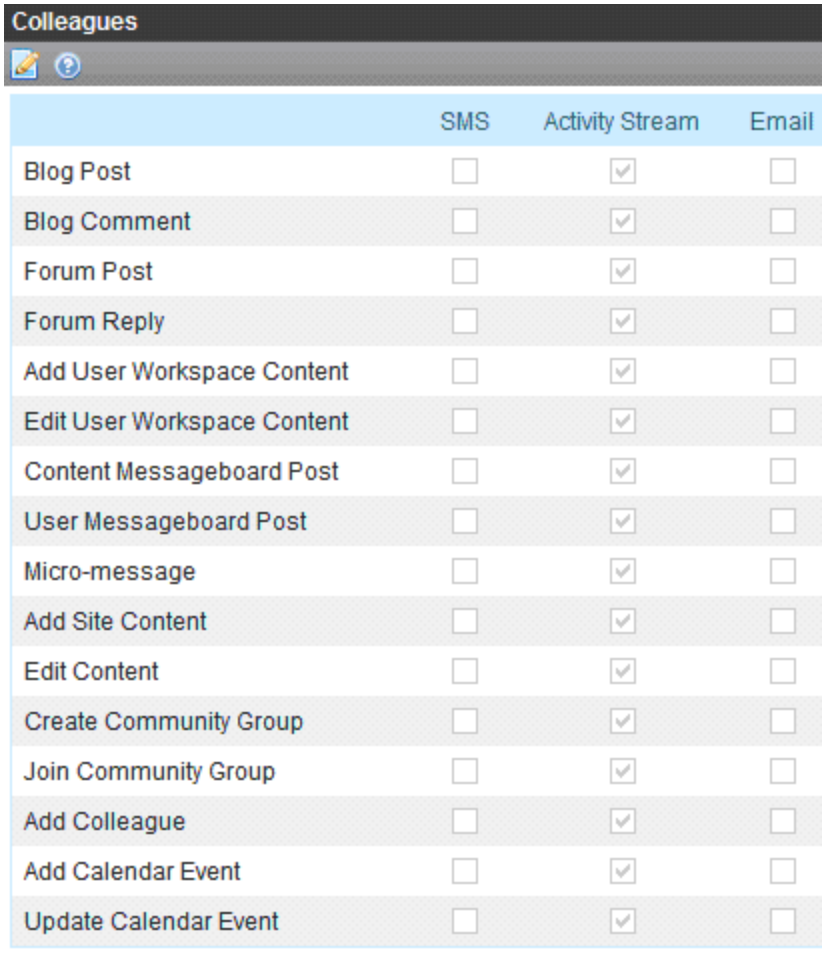
Note: If you are upgrading to Version 8.0, all activities are checked for the Activity Stream agent by default. No activities are checked for the other agents by default.

Step 3A: Setting Default Colleague Notifications

To set default Notifications for colleagues, follow these steps.

1. Log in to the Ektron CMS400.NET Workarea as an administrator.
2. Navigate to Settings > Community Management > Notifications > System Default Preferences > Colleagues.
3. Click the Edit button ( ).
4. Place a check mark next to each a default Notification.


Colleagues
SMS
Activity Stream
Email
Blog Post
Blog Comment
Forum Post
Forum Reply
Add User Workspace Content
Edit User Workspace Content
Content Messageboard Post
User Messageboard Post
Micro-message
Add Site Content
Edit Content
Create Community Group
Join Community Group
Add Colleague
Add Calendar Event
Update Calendar Event



5. Click the save button.

Step 3B: Setting Default Community Group Notifications

To set the default Notifications of community group activities, follow these steps

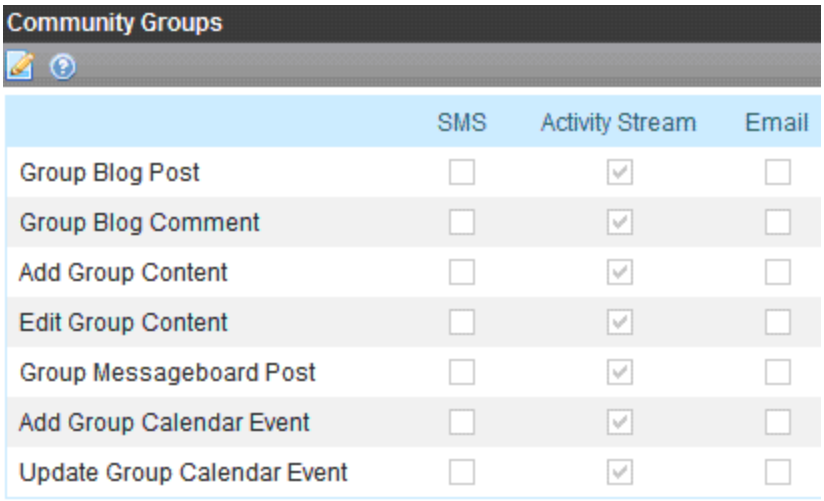
Community group members can modify their group's preferences. To do this, they access any community group's profile, then click Edit Group Notification Preferences.

1. Log into the Workarea as an administrator.

2. Navigate to Settings > Community Management > Notifications > System Default Preferences > Community Groups.

3. Click the Edit button.

4. Place a check mark in each box you want to be a default Notification.

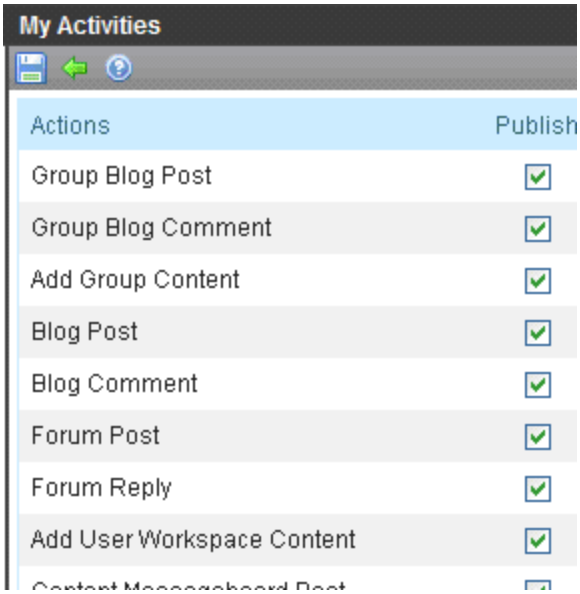


5. Click the save button

Step 3C: Setting Default Notifications For Your Activities

To set the default Notifications of the logged-in user's activities that will be sent to other users and groups, follow these steps.

1. Log into the Workarea as an administrator.
2. Navigate to Settings > Community Management > Notifications > System Default Preferences > My Activities.
3. Click the Edit button.
4. Place a check mark in each box you want to be a default Notification.



5. Click Save Button.

Step Four: Set up the email Reply Feature

The optional email Reply Feature consists of additional text in a community notification that prompts a recipient to reply, as shown in the following example.

From: testemailer@ektron.com [mailto:testemailer@ektron.com]
Sent: Thursday, September 23, 2010 2:20 PM
To: John Smith
Subject: user1@test.com updated their
activity message
user1
Group Content Added by user1
Reply to this email to add a comment to this item.
[activity: 8b99c768-2de6-4dd8-b1fc-d1a91358
email reply

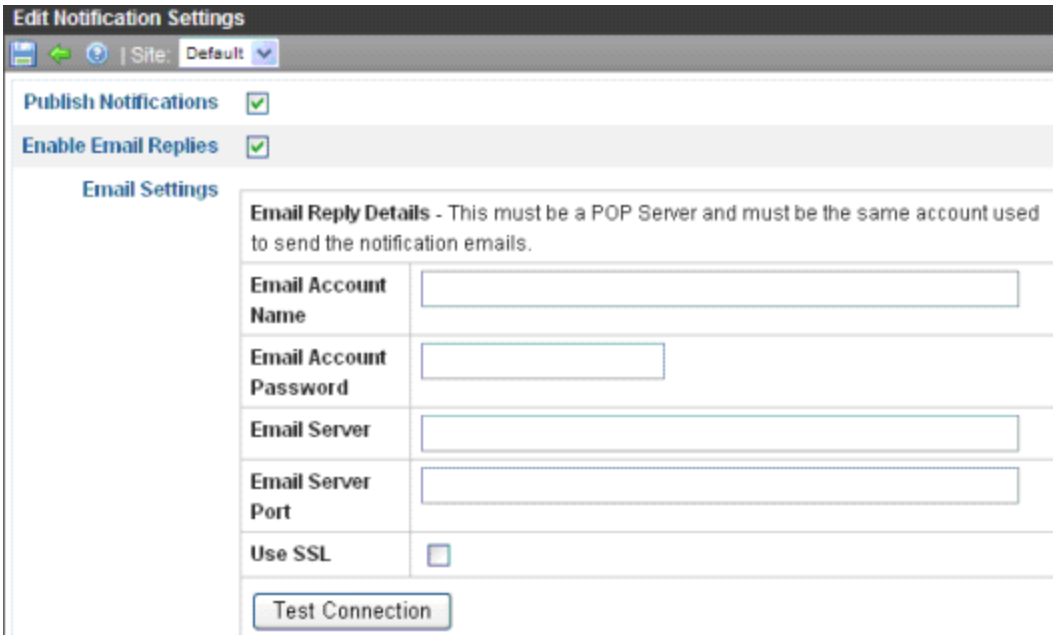
If the recipient replies, the resulting email is posted to the group's message board.

Important: The Community email Reply feature is only available with group activities, such as uploading a document to a group workspace. It is not available with user activities.

Prerequisite: The community notification feature must be enabled.

Step 4A: Enter the Receiving Email Address Information

Specify the email address that will receive email replies in the Community Notification Settings screen.


Edit Notification Settings
Site: Default
Publish Notifications
Enable Email Replies
Email Settings
Email Reply Details - This must be a POP Server and must be the same account used to send the notification emails.
Email Account Name
Email Account Password
Email Server
Email Server Port
Use SSL
Test Connection

Prerequisite: You must be a member of the Administrators group or the community group administrator.

To enter receiving email address information, follow these steps.

1. From the Ektron CMS400.NET Workarea, choose Settings > Community Group > Notifications > Settings.

2. Use the following table to complete the screen.

Field	Description
Enable Email Replies	Check this box to access the fields in the lower part of the screen.
Email Account Name Important: Each community group's email address must be unique.	Enter the address that receives email delivered to your Web site. The email account must be the same as the account used to send email.See Also: Step One: Enter Sending Email Address Information
Email Account Password	Enter the password for that email address.
Email Server	Enter the POP mail server that retrieves email for this account.
Email Server Port	Enter the port number used to retrieve email for this account.
Use SSL	Check this box if you use SSL when retrieving email.
Test Connection	After you complete the above fields, click this button to verify the information and your ability to connect to the mail server.

Note: If you are using Gmail as the SMTP server to fetch email replies, after the notification service processes the emails, you probably want to delete them from the Inbox. To set up automatic deletion of this email from the Inbox, got to Gmail's Settings screen > Forwarding and POP/IMAP tab >Pop Download Area > 2. When messages are accessed with POP > select delete Gmail's copy.

Step 4B: Review the email Reply Message

Community activity that generates an email also can include a reply statement, as shown in the following example.

From: testemailer@ektron.com [mailto:testemailer@ektron.com]
Sent: Thursday, September 23, 2010 2:20 PM
To: John Smith
Subject: user1@test.com updated their
activity message
user1
Group Content Added by user1
Reply to this email to add a comment to this item.
[activity: 8b99c768-2de6-4dd8-b1fc-d1a91358
email reply

Note: The activity message text is determined by the activity. For example, if the activity is a blog post, the message text is retrieved from the New Blog Post notification message.

To review and modify email reply text, follow these steps.

Prerequisite: You must be a member of the Administrators group or the community group administrator.

1. In the Workarea, choose Settings > Community Management > Notifications > Messages.

2. Click Email Message Reply.

3. You cannot edit the Title, Type, Sub Type or Default check box.

4. The Subject field is not used.

5. Edit the message text. You can create an HTML-based and a plain text message for each activity. Typically, HTML messages are sent as email or to the ActivityStream server control, while plain text is used in SMS style messages.

Messages typically combine text and tokens, Ektron-defined variables surrounded by at signs (@). When a message is generated, tokens retrieve information about Ektron CMS400.NET users, groups, and objects.

How email Replies are Handled

Activity notifications can prompt recipients to reply. The following table shows how each activity treats email replies.

Note: If you are in a load-balanced environment, the same reply may appear several times. If this problem occurs, stop the Ektron notification service on all but one of the servers in the cluster.

Activity that Triggers Message	How email Reply Handled
User adds a colleague	Comment on Activity Stream
User adds content to Ektron CMS400.NET	Post to Content Message Board
Event is added or changed on Web Calendar	Comment on Activity Stream
User uploads content to community group Workspace	Post to Content Message Board
User comments on group workspace content or asset	Comment on Activity Stream
User uploads content to his profile	Post to Content Message Board
Comment on user workspace content or asset	Comment on Activity Stream
User comments on a blog post	Comment to same blog post
User posts to his blog	Comment on post
User posts to a message board associated with content	Reply to post
User creates a community group	Comment on Activity Stream
User posts to a Forum	Reply to post
User replies to a Forum post	Reply to post
User comments on a community group's blog post	Comment on same blog post
User posts to community group blog	Comment on post
User posts to a community group message board	Reply to post
User joins community group	Comment on Activity Stream
User posts micro-message	Comment on Activity Stream
User updates his status	Comment on Activity Stream
User posts to another user's message board	Reply to post
Message board reply	Reply to same post

Step Five: Enable Attachments to Notifications

Ektron CMS400.NET can attach assets to a notification. For example, a user uploads a PDF document to a group workspace, which generates aGroup Content Added notification and attaches the asset.

If you enable attachments and the email Reply feature, message recipients can download an attached asset to their computer, modify it, and reply to the email and attach the modified asset. If they do, Ektron CMS400.NET replaces the community group asset with the attached file.

If a group administrator does not want the revision, he can use the asset history to restore the original asset. See Also: Viewing and Restoring Previous Content

Important: If a message's email signature includes an image, the email Reply feature uploads it as a group asset. To avoid this, remove the image from the signature before replying.

To set up notification attachments for a community group, follow these steps.

1. From the community group page, click Edit Group.

   Alternatively, in the Ektron CMS400.NET Workarea, choose Settings > Community Management > Community Groups > click a community group.

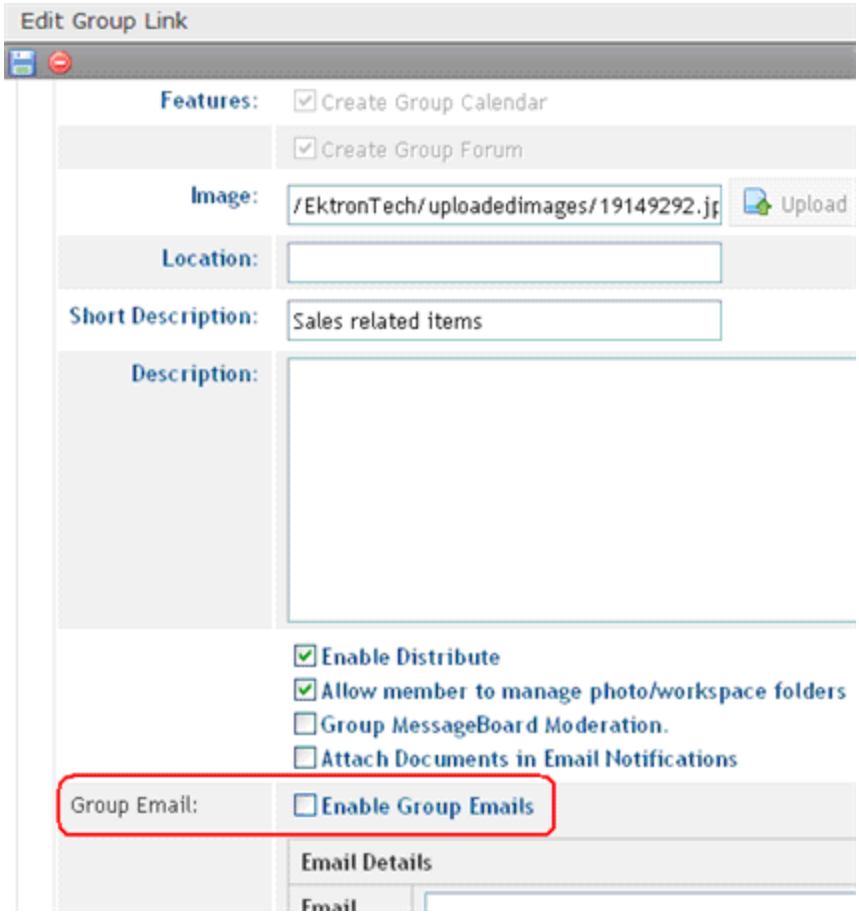
2. Near the bottom of the screen, check the Attach Documents in Email Notifications box.

3. Click Save ( ).

Define a Community Group's email Address

You can set up Ektron CMS400.NET's Community Feature to let anyone email a post to a community message board. To set up this capability, each community group administrator (or Ektron CMS400.NET administrator) must define information about the receiving email account, as shown in the following steps.

1. On community site's group page, go to Edit Group > Properties tab > Enable Group emails checkbox.



Alternatively, from the Workarea, choose Settings > Community Management > Community Groups. Click the group, then click itsProperties tab and check the Enable Group emails checkbox.

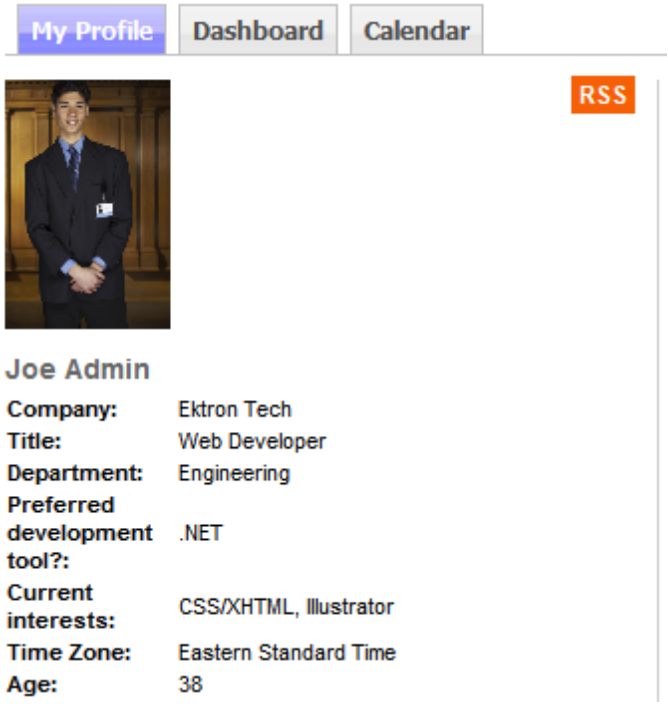
2. Enter the group's email address, account name and password.

Exercise 38-1: My Profile

One of the advantages to the Social Networking system is that individuals can manage their own profile information. Information can be updated and immediately made available to anyone viewing a profile.

Objective

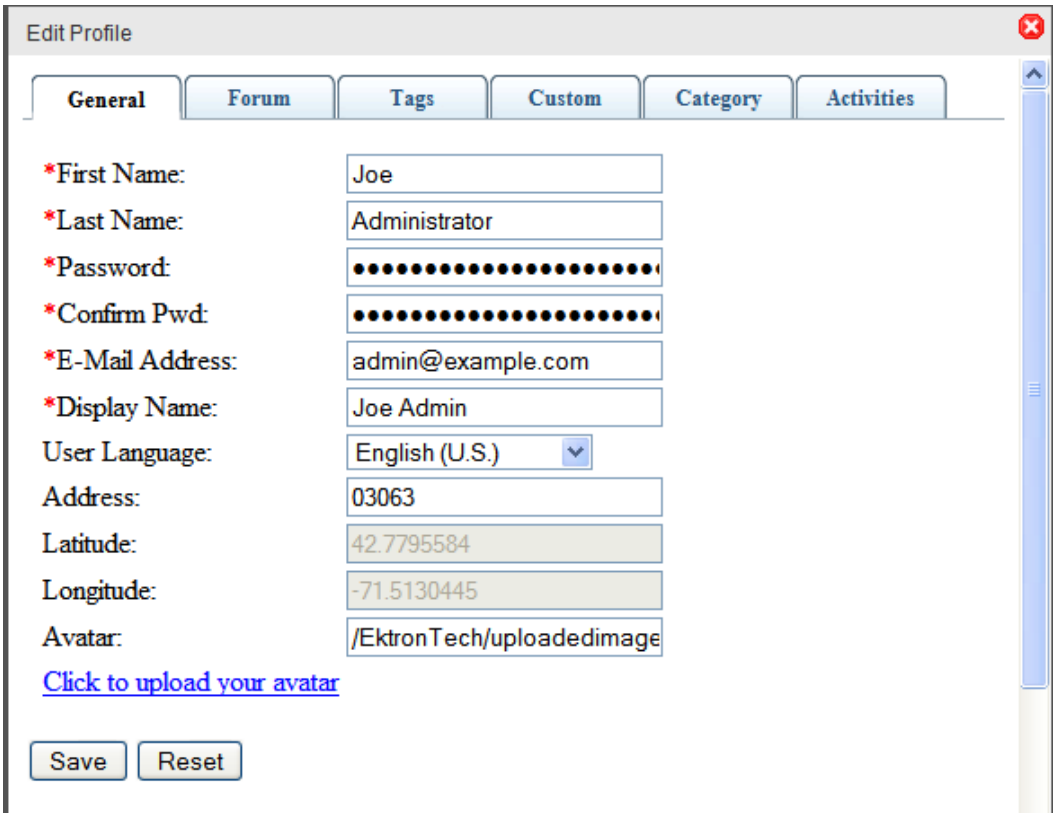
Learn to edit your personal profile information.



Scenario

You have been recognized for your expertise to work on large complex projects and have taken the opportunity to work in the Project Management Office of your company. Your new phone and extension will be 603-555-1234. Update your profile information.

Also consider: Is it time to update the Avatar? Did you remember to change the department in the Category tab too? Are your tags up to date?



Is Privacy Important?

Users can determine if their profile is viewable via the Private Profile drop down box on the Membership Registration screen and the Edit Profile screen. If Private Profile is set to Private, profile information is suppressed. If it is set to Colleagues, only a user's colleagues can see his profile. When set to public, everyone can see a user's profile information.

Exercise 38-2: Activity Streams

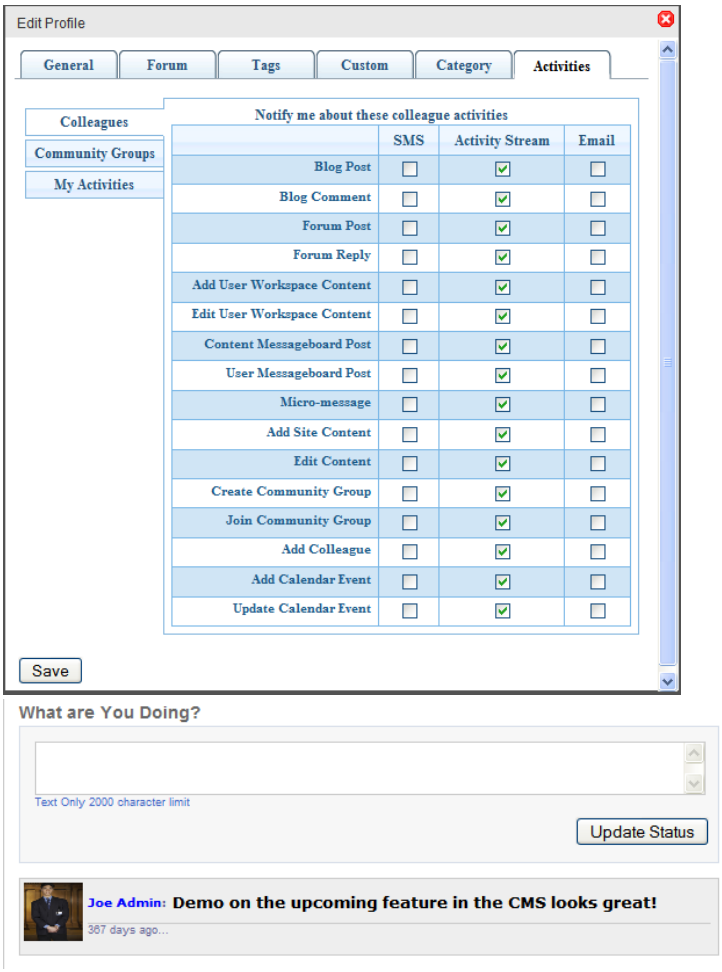
The Activity Stream allows you to see what is going on in your groups or with your colleagues. Through your activity stream, you can see if there have been any blogs or message board anyone associated to you through colleagues or groups have posted to.

Activity Stream
joy@example.com is Here's a link related to the article I read http://blogs.navellier. /all_cap/archives /2009/05/
Share 360 days ago...
joy@example.com is Reading through an article on the WSJ regarding the outlook for Q4
Share 360 days ago...
jmember and ben@example.com are now colleagues.
Share 360 days ago...
Page 1 of 5

Objective: To learn how to manage what you see through your activity stream, and what activities you allow your colleagues and group members see.

Scenario:

Go to your profile page and edit your profile. Choose the Activities Tab. You can manage not only what you see that your groups and colleagues do, but what you do that they will show in their activity streams. Also Update your status. Then go back to the home page, refresh and you will see a link to the Company Activity Stream with your new status update.



Status Updates are limited to 2000 characters

Also Consider: Can you see who has updated their latest blogs or status? What are people working on at this moment?

Commenting on an Activity Stream Event

Each activity in a stream has a Comment link below its text (see example below).

When you click it, a Comment box opens for you to add a comment.

When you finish, the comment link displays the number of comments on that activity. Users can click the number to view the comments.

Only the user who made the comment or a member of the Ektron CMS400.NETAdministrators group can delete the comment.

Exercise 38-3: My Photo Gallery

The old Chinese proverb says "A picture is worth 10,000 words" or does it?* In the Social Networking Photo Gallery, you can add pictures and images needed to share any important information for your associates to view and enjoy.

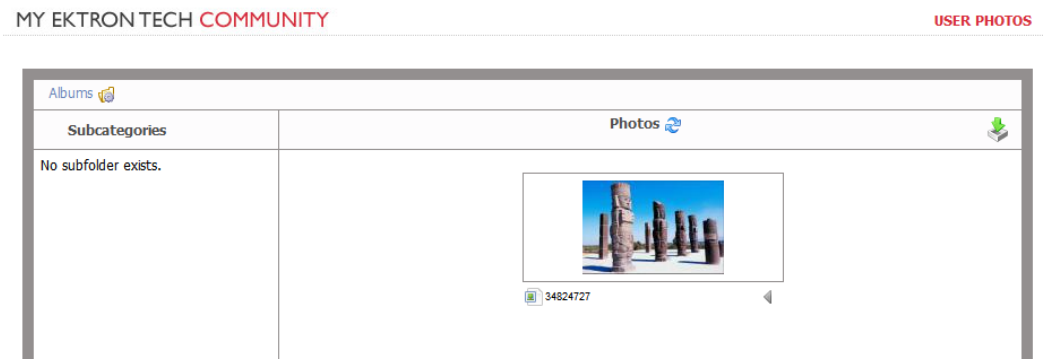
Objective

Learn to use the Photo Gallery

Scenario

As part of your new Project Management job, you need to be sure that everyone understands where you are coming from. Find pictures and insert them into the Photo Gallery that represents you best.

My Photos



* If you want to know….

This is the original "Chinese proverb" from the streetcar advertisement.

The quotation has wrongly been translated as: A Picture Is Worth One Thousand Words.

In fact, the literal translation is: A Picture's Meaning Can Express Ten Thousand Words.

Somehow the phony Chinese proverb over the years has been given the literal meaning that a picture is equivalent to a thousand words setting up a clash between words and pictures in the minds of users of the two. With digital hegemony, visual messages have reasserted their position as an important communication medium, but at the cost of not recognizing the combination of words and pictures as vital in communication. With the correct interpretation of the proverb, words and pictures live in harmony as they are both used equally in order to understand the meaning of any work that uses them both. (Credit to: http://commfaculty.fullerton.edu/lester/writings/letters.html)

Exercise 38-4: Private Messages

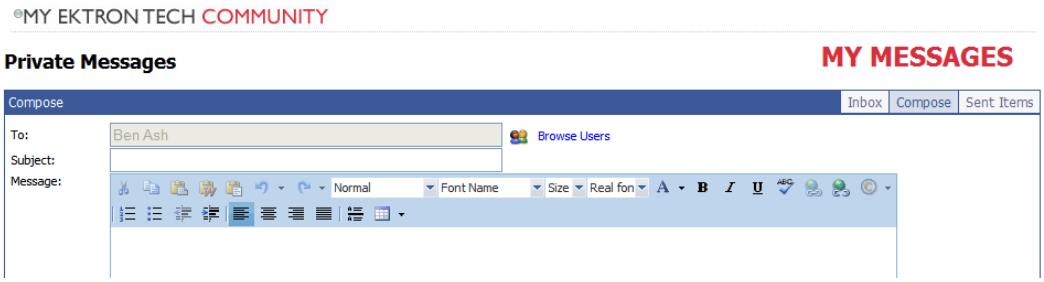
Logged in users can send private messages to one another within the Social Networking environment. Only the sender and receiver can view private messages. This requires both users to be either a CMS400.NET user or a Membership user.

Objective

Learn to use the message system in the collaboration area.

Scenario

You need to let a fellow coworker know that the photos or images you put in your Photo gallery are available. Send them a private message to invite them to view them.



Also consider: Would you like to find others to include on this message? (Did you see how to browse users to add more? Would adding styles, hyperlinks or images from the library help with your message?

Exercise 38-5: Documents

The Documents area allows you to add assets and HTML content to Ektron CMS400.NET and associate it with your profile. You can create subfolders to separate content by category. Folders and files in the Documents area are separate from the Content folder structure and its files. Assets and HTML content in this list have the same properties and actions available to those found in the Content folder structure. You load documents by using the DMS drag-and-drop functionality.

Objective

Learn to use the Document Management and sharing area in the personal profile.

Documents
Workspace
Ektron Tech
One of the biggest problems web designers face is the variety of devices that need to be supported. A site not only has to look good on the average screen, but also on a 26" widescreen monitor and a 3"
Modified: 11/26/2008 3:26:42 AM
My Test
My first test
Modified: 5/5/2008 5:49:21 AM

Scenario

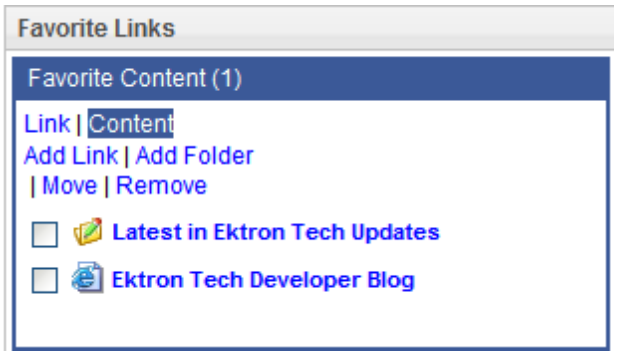
Project documents constantly change. Key documents that you create or maintain should be easy for your teammates to find. By housing key Microsoft Office PowerPoint, Word Documents or Excel files in your profile document area, you can find and easily manage them.

You need to make three documents available in your profile area. Place any three types of documents you have into the document area.

Also consider: Did you update the summary information so it makes sense? Did you set a category for the document?

Exercise 38-6: Links|Content

Placing links to your favorite sites or content makes this information quick to find and use.



Objective

Learn to use the Links/Content feature.

Scenario

In project management, you will need to quickly get to other sites that help you do you job. Find some external sites to use and place links to these places into your Favorite Links Section. Also add some Favorite Content links into the Content section.

Also consider: Do you have web site links that you use every day? Would it help to have these links here as a favorite? Maybe you should have a link to your own web site home page for your company?

Objective

Learn how to use colleague invitations

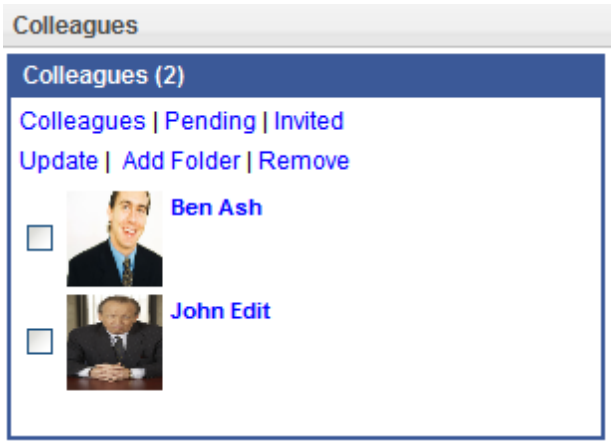
Scenario

Now that you've begun to work in your department – the group of collegues in your Project Management Office are different. (In more ways than one you say?) It's probably a good idea for you to update your colleagues list. Drop the ones that you feel you don't need or organize them into another folder. Select some new collegues.

Also consider: If you invited them to become your friend, what must they do to accept the invitation? If you remove a friend, what happens? Do they feel the pain? ;)

Exercise 38-7: Colleagues

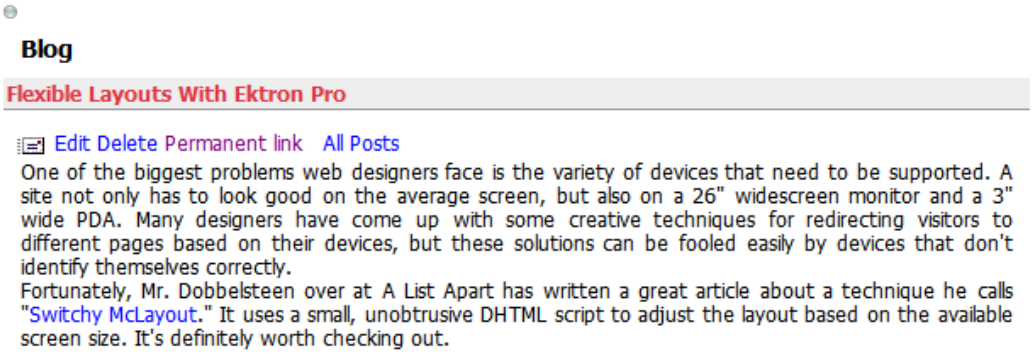
Establishing a connection to your Colleagues via Social Networking allows you to share your information with specific people. When the connection to others is made, you will be able to visit their page and gather comments, blogs, pictures, documents and other information that will be helpful as you work with them. You are able to see their information when you need it.



Exercise 38-8: Blogs

Blogs (short for Web Logs) are a form of online information sharing. A blog is often set up so a group of people can share their thoughts on a subject. One person creates the main post and others comment on post. In addition, a blog can be used to create an online diary of everyday life – even a regular progress or status report for the boss to read.

In the Ektron CMS400.NET Workarea, blogs and blog posts have a relationship similar to folders and content. The blog is the equivalent of a folder, and blog posts are the equivalent of content items. While blogs and blog posts have a few unique properties, they mostly work the same as folders and content.


Blog
Flexible Layouts With Ektron Pro
Edit Delete Permanent link All Posts
One of the biggest problems web designers face is the variety of devices that need to be supported. A site not only has to look good on the average screen, but also on a 26" widescreen monitor and a 3" wide PDA. Many designers have come up with some creative techniques for redirecting visitors to different pages based on their devices, but these solutions can be fooled easily by devices that don't identify themselves correctly.
Fortunately, Mr. Dobbelsteen over at A List Apart has written a great article about a technique he calls "Switchy McLayout." It uses a small, unobtrusive DHTML script to adjust the layout based on the available screen size. It's definitely worth checking out.

Objective

Learn how to enter blog posts on your personal journal.

Scenario

The time flies when we're having fun right? Well, the boss wants you to update your blog to show what you've learned this week. Update your blog with everything you know so no one will read the fine print at the bottom! Get started now….

Also consider: Did you think about categorizing your subject so that it could be easily found later? Did you include a link to someone else's blog or content? Would a picture help tell the story? (Advanced – maybe you ought to comment on somebody else's blog – won't that make you feel better anyway?)

Exercise 38-9: Message Board

Just like a hallway message board, information that you want to share can be placed here. From time to time, your colleagues may leave you messages or comment on subjects you care about or read your own comments.

Objective: Learn to post messages on the personal message board.

Scenario

Go to your message board and explain what you believe you will be doing in the next few weeks of your new Project Management job.

Also consider: Should you also leave a message on another message board for others to see? Did the person receive an email when you posted the message on the board?

Messages are limited to 2000 characters.

Exercise 38-10: Personalization / Dashboard

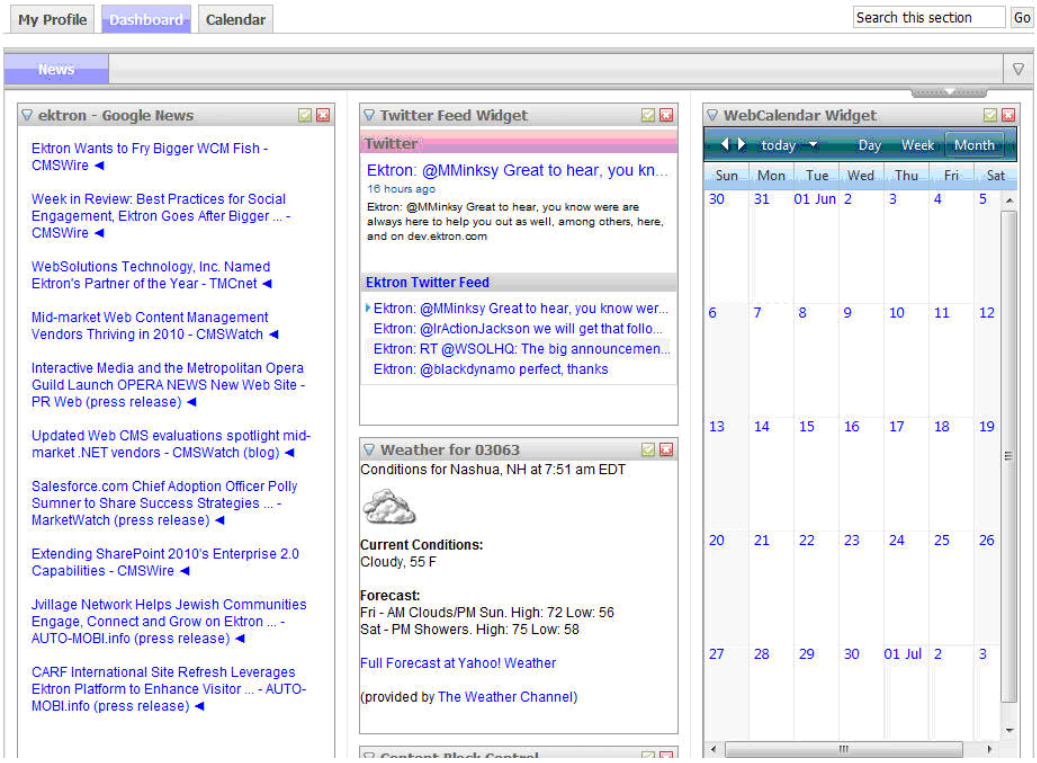
The dashboard in the user's personal area allows customization with the use of widgets. These widgets can be used for many types of content including: CMS content, CMS Listsummary; Calendars, RSS Feeds, Weather or Time, Speical interfaces.

Objective: Learn to customize your Dashboard.

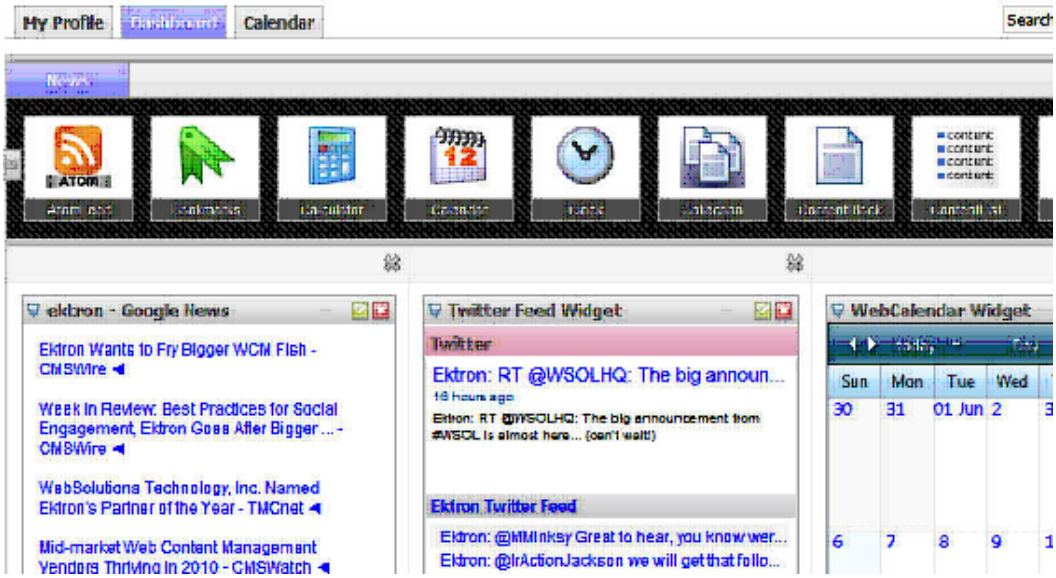
Scenario

Go to your Dashboard and create a new "Project Management" tab. Inside of this tab, insert widgets that you can utilize in your project management role.

Also consider: Is there outside content from news feeds you would like to use? Should there be an interface to a CRM system? Should you be looking for the latest updates inside of a content folder? Wouldn't a flickr picture of some cute dogs make your day?


My Profile
Dashboard
Calendar
Search this section
Go
News
ektron - Google News
Ektron Wants to Fry Bigger WCM Fish - CMSWire
Week in Review: Best Practices for Social Engagement, Ektron Goes After Bigger ... - CMSWire
WebSolutions Technology, Inc. Named Ektron's Partner of the Year - TMCnet
Mid-market Web Content Management Vendors Thriving in 2010 - CMSWatch
Interactive Media and the Metropolitan Opera Guild Launch OPERA NEWS New Web Site - PR Web (press release)
Updated Web CMS evaluations spotlight mid-market .NET vendors - CMSWatch (blog)
Salesforce.com Chief Adoption Officer Polly Sumner to Share Success Strategies ... - MarketWatch (press release)
Extending SharePoint 2010's Enterprise 2.0 Capabilities - CMSWire
Jvillage Network Helps Jewish Communities Engage, Connect and Grow on Ektron ... - AUTO-MOBI.info (press release)
CARF International Site Refresh Leverages Ektron Platform to Enhance Visitor ... - AUTO-MOBI.info (press release)
Twitter Feed Widget
Twitter
Ektron: @MMinksy Great to hear, you kn...
16 hours ago
Ektron: @MMinksy Great to hear, you know were are always here to help you out as well, among others, here, and on dev.ektron.com
Ektron Twitter Feed
Ektron: @MMinksy Great to hear, you know wer...
Ektron: @IrActionJackson we will get that follo...
Ektron: RT @WSOLHQ: The big announcemen...
Ektron: @blackdynamo perfect, thanks
Weather for 03063
Conditions for Nashua, NH at 7:51 am EDT
Current Conditions:
Cloudy, 55 F
Forecast:
Fri - AM Clouds/PM Sun. High: 72 Low: 56
Sat - PM Showers. High: 75 Low: 58
Full Forecast at Yahoo! Weather
(provided by The Weather Channel)
WebCalendar Widget
today
Day
Week
Month
Sun
Mon
Tue
Wed
Thu
Fri
Sat

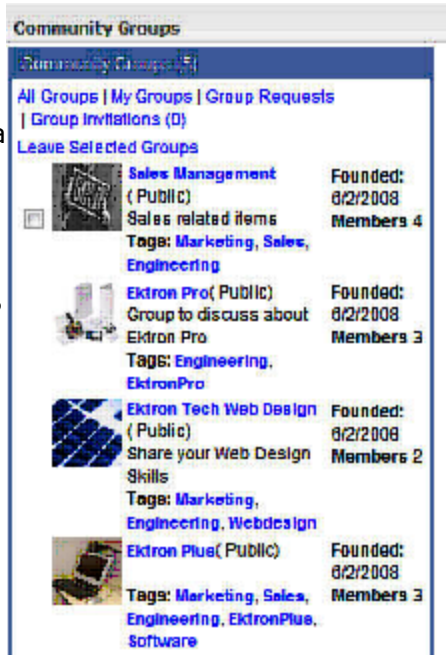
Adding a Widget to the Dashboard


My Profile
Calendar
ektron - Google News
Ektron Wants to Fry Bigger WCM Fish - CMSWire
Week in Review: Best Practices for Social Engagement, Ektron Goes After Bigger ... - CMSWire
WebSolutions Technology, Inc. Named Ektron's Partner of the Year - TMCnet
Mid-market Web Content Management Vendors Thriving in 2010 - CMSWatch
Twitter Feed Widget
Twitter
Ektron: RT @WSOLHQ: The big announ...
Ektron Twitter Feed
Ektron: @MMinksy Great to hear, you know wer...
Ektron: @IrActionJackson we will get that follo...
WebCalendar Widget
Sun
Mon
Tue
Wed

Exercise 38-11: Groups

Groups within the Social Networiing tools allow for specialized access to teams of people to work together. The same functionality used by individuals (blogs, comments, documents, content) can also be used by groups.

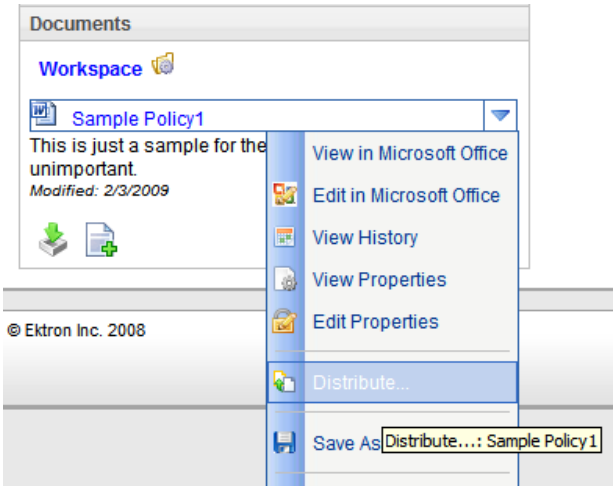
Objective: Create a group and connect others to it.



Scenario

Your first project in the Project Management Office is to establish a location for the working group that is responsible for implimenting ISO9001 in your office. Create the group and invite the team members.

Also consider: Should this be private or public? If you make it private, can you distribute documents to people outside the group? How?



Unit 40 – PageBuilder

Reference: "PageBuilder" in the *Ektron CMS400.NET Reference Manual.*

Note: The EktronTech sample site will be used for the following exercise.

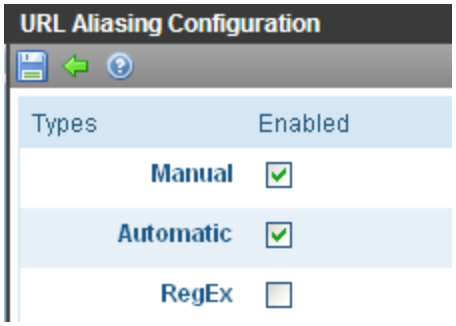
PageBuilder is a technology that is aimed at providing marketing departments and other non-technical users the tools to build entire Web pages on their own. The Ektron developer community can also leverage the PageBuilder as a simple way to reuse and share common functionality from one Ektron-powered site to another.

While the PageBuilder addresses non-technical departmental needs, technical resources still control the overall site framework. Developers build the templates and develop the functional "Widgets." Site administrators determine where non-technical users are empowered to build new pages and with which specific Widgets.

Exercise 39-1: PageBuilder Set Up

Manual URL Aliasing must be turned on for this feature. With this, you can apply a "friendly" URL to your page.

1. Navigate to the **Workarea Settings > Configuration> URL Aliasing > Settings**.
2. Enable the **Manual** alias type.

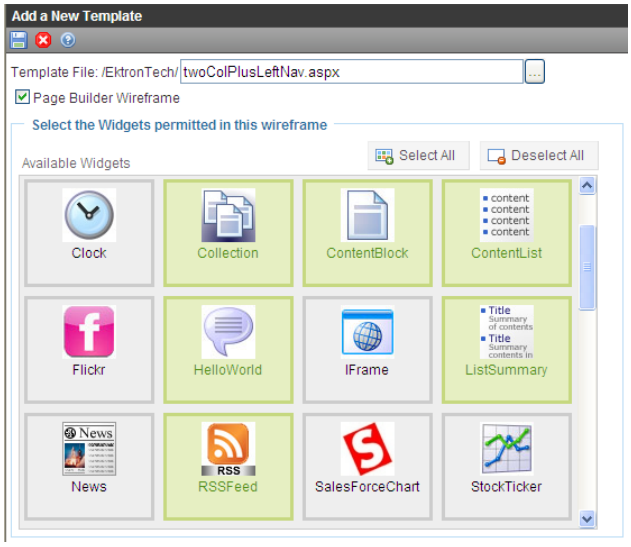


3. Then click **Save** ( ).

Exercise 39-2: Add the PageBuilder template into the CMS400

Note: The training site (EktronTech) that you are using already has sample pagebuilder wireframe templates that will be used for training. Exercise 39-2 is provided as reference on how to register new pagebuilder wireframe template with

1. In the Workarea, go to **Settings > Configuration -> Template Configuration**.
2. Click the **Add** button ( ).
3. Use the button to choose from the available templates on the server.
4. Choose the pagebuilder wireframe template that was created by your developer. For example "MyWireFrame.aspx" template.
5. Check the "PageBuilder Wireframe" box.
6. Select the widgets that you want made available to your PageBuilders for this wireframe template. When you have these selected, the background color of these widgets will change.

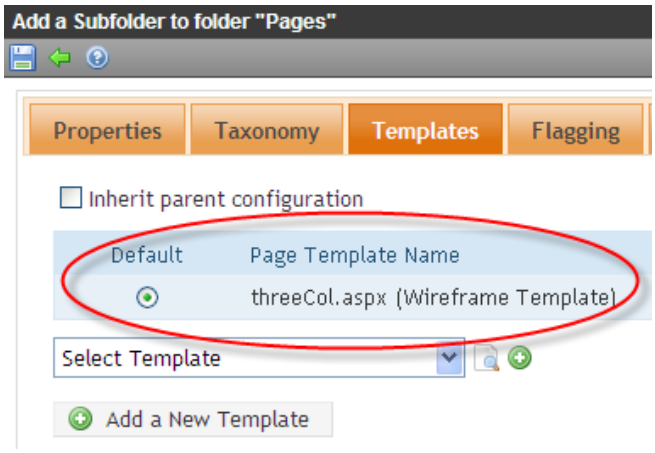


7. Click the Add New Template button ( ).

Exercise 39-3: Adding a Page Layout folder

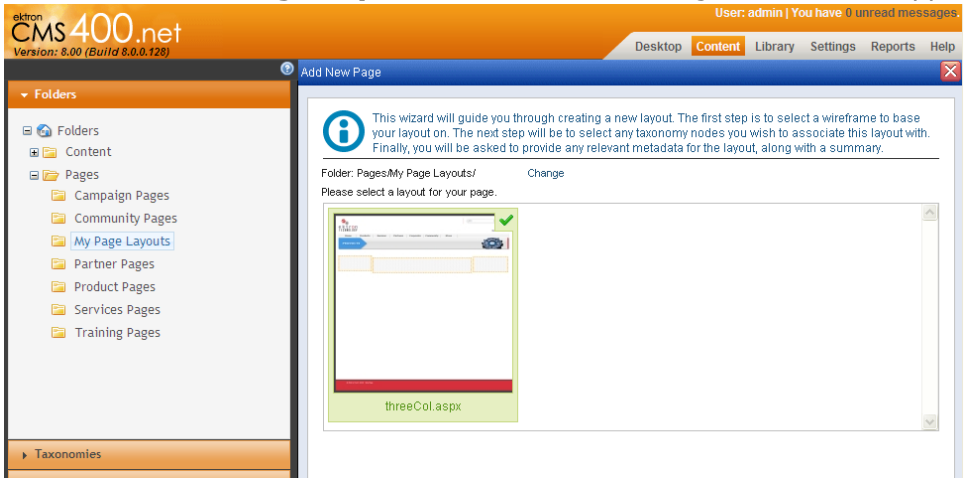
1. Go to **Workarea -> Content -> Pages** folder.
2. Add a new folder named "My Page Layouts".
3. Add "threeCol.aspx" as the default template for this folder.

4. Click the **Update** button ( ) to create the new folder called "My Page Layout".



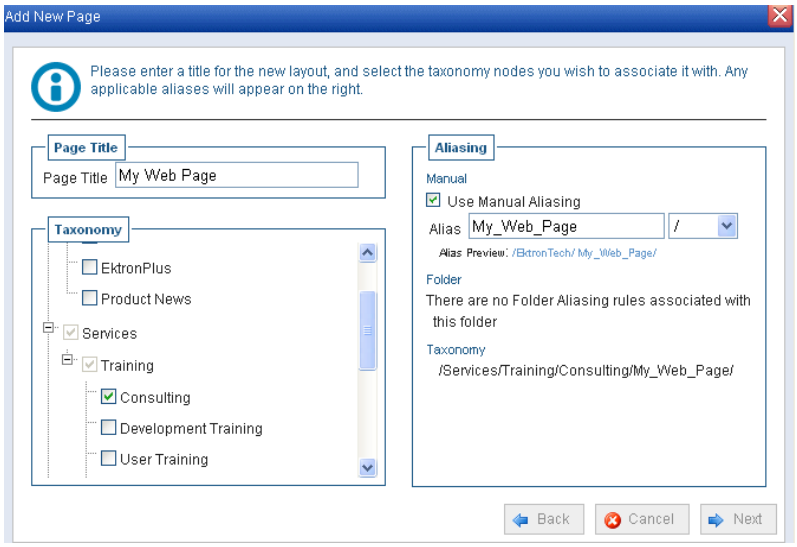
Exercise 39-4: Creating a web page with PageBuilder

1. From the Workarea Content tab, select the "My Page Layout" folder.
2. Click on **New -> Page Layout** and an "Add New Page" wizard will appear.

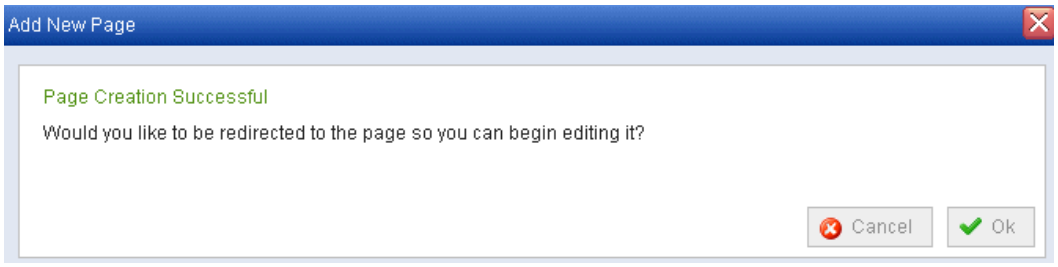

CMS 400.net
Version: 8.00 (Build 8.0.0.128)
User: admin | You have 0 unread messages.
Desktop
Content
Library
Settings
Reports
Help
Add New Page
Folders
Content
Pages
Campaign Pages
Community Pages
My Page Layouts
Partner Pages
Product Pages
Services Pages
Training Pages
Taxonomies
This wizard will guide you through creating a new layout. The first step is to select a wireframe to base your layout on. The next step will be to select any taxonomy nodes you wish to associate this layout with. Finally, you will be asked to provide any relevant metadata for the layout, along with a summary.
Folder: Pages/My Page Layouts/
Change
Please select a layout for your page.
threeCol.aspx

3. Click **Next**.
4. Enter the page title as "My Web Page".
5. The system will automatically use the page title as the alias. In this case "My_Web_Page.aspx". You can manually change the alias and extension if you desire.

6. Select "**Services -> Training -> Consulting**" for the Taxonomy.



7. Click **Next** and fill in the Metadata information.
8. Click the **Finish** button and "Page Creation Successful" will appear.

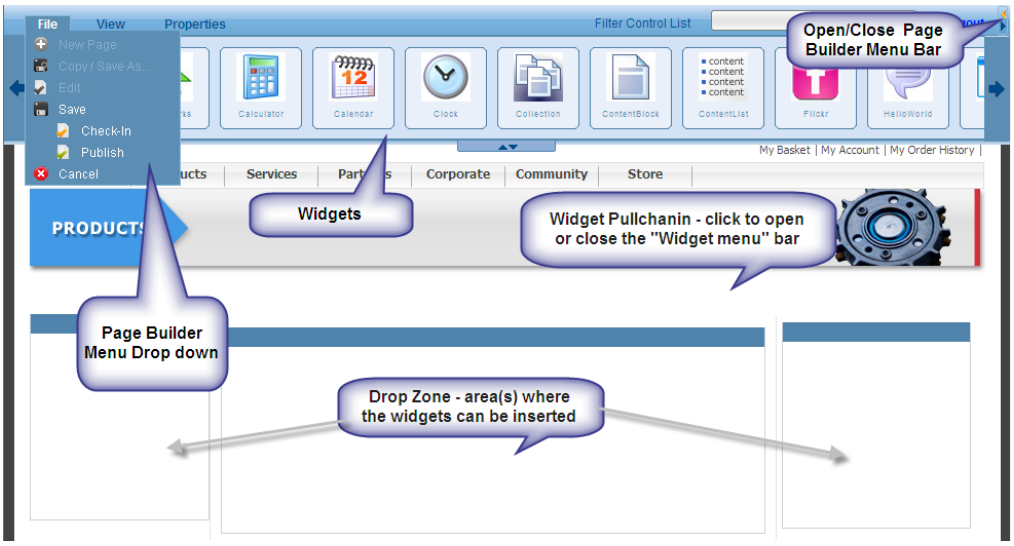


9. Click **OK** and blank PageBuilder page window appears.

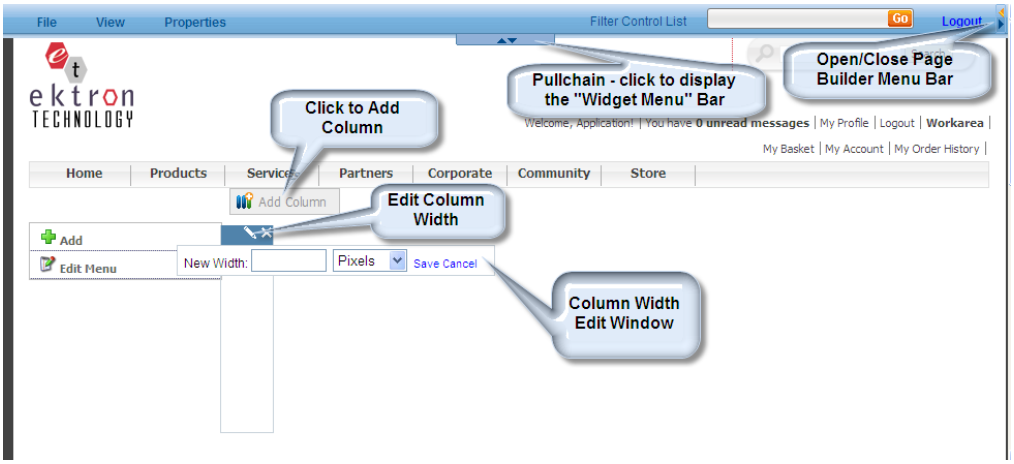
Edit Page Layout

After entering OK in the previous step, the Edit Page Layout will appear. Otherwise, you may go to the "My Page Layout" folder and Edit the "My Web Page" PageBuilder content. The page layout controls will appear.

Fixed Column and Width

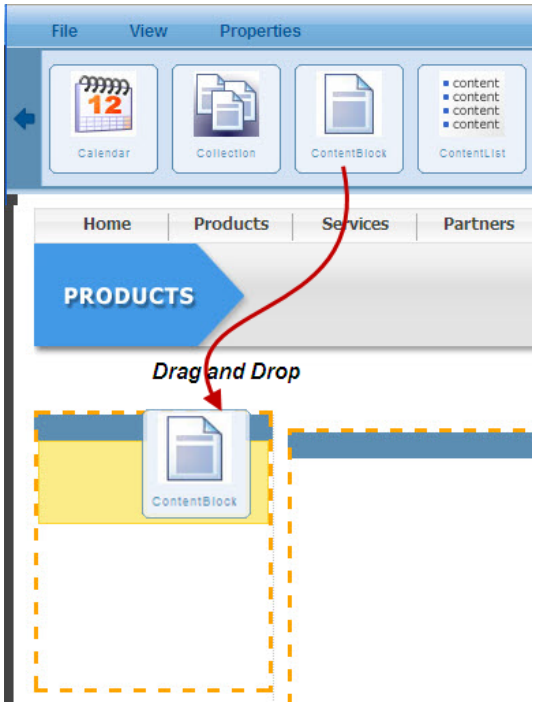


Adjustable Column and Width

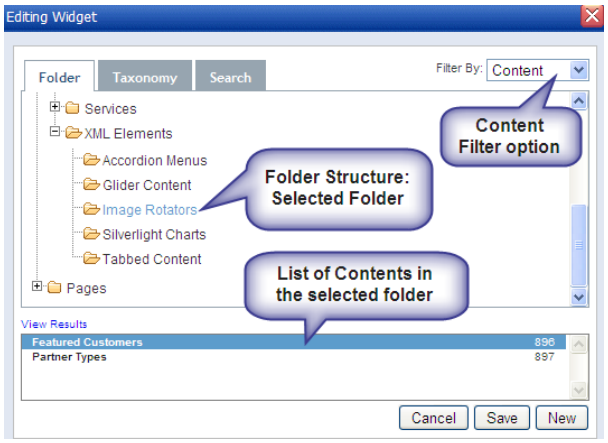


Note: Perform steps 1 – 5 for PageBuilder page with "Add Column" and "Edit Column Width" enabled, otherwise skip to Step 6.

1. Click on the **Add Column** button to make our Page have two columns.
2. In the left hand column click the pencil icon to edit the column width.
3. Set the column width to 300 pixels
4. In the right hand column, click the pencil icon to edit the column width.
5. Set the column width to 450 pixels.
6. Click the pullchain icon to show the widgets you may add to the page layout.
7. Drag the **Content Block** widget into the Left Column. (This places a Content Block on the page and shuts the PageBuilder Tool Bar.)



8. Click on the Edit Properties "pencil" for the Content Block.

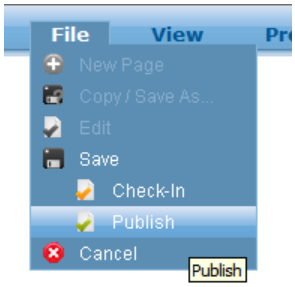


9. Select the **Content > XML Elements > Image Rotators** folder and then select the "Featured Customers" in the View Results box. Click **Save** button.
10. Open the PageBuilder tool bar again by hitting the Orange Open/Close tool in the upper left corner of the page.
11. Click the pullchain and drag the Listsummary widget below the Calendar in the Left hand column.
12. Set the **Widget Properties** by clicking the pencil on the gray bar.

13. Select the **Content > Corporate > About Us** folder and click **Save** button.
14. In the Middle column, add a Content Block widget. Set it to the "About Us" content found in the "About Us" folder.
15. In the Right Column add a Content Block Widget. Select the "Root" folder and select the "Ektron In The News" content and then click Save.
16. In the Right Column drag a "RSS Feed" widget below the content block.
17. Set the "RSS Feed" widget properties and set the feed to:
    `http://news.google.com/news?pz=1&ned=us&hl=en&q=ektron&output=rss`
    Your new page will look like this.

File
View
Properties
Filter Control List
Logout
Search
ektron
TECHNOLOGY
Welcome, vs! | You have 0 unread messages | My Profile | Logout | Workarea |
My Basket | My Account | My Order History |
Home
Products
Services
Partners
Corporate
Community
Store
PRODUCTS
Content Block
COMPANY NAME
List Summary
About Ektron Tech
Directions
About Ektron Tech
Our Company
At the heart of Ektron Tech is our commitment to our customers and our dedication to finding a better way of helping them manage information and use their time and energy more efficiently and effectively.
Our mission is to provide you with best-of-breed content and document management solutions that scale with your organization, provide advanced functionality, and are easy to use, while addressing your real-world requirements.
CEO George Pierce founded Ektron Tech in 2001 based on the philosophy that managing your business should be simple and affordable for any organization. Ektron Tech's first products led to the creation of an entire new market. Ektron Tech's solutions have become the standard tools in the industry.
Pierce and his team had the unique opportunity to work with and listen to thousands of developers and non-technical users to learn about their larger management challenges. Armed with this valuable feedback, Ektron developed management solutions "for the masses."
Today, Ektron Tech's products are known for their ease of integration, ease of use, and advanced functionality built on a familiar platform. With our consistent, ongoing focus on innovation, Ektron Tech redefined management and today is the choice for thousands of organizations, design and development firms, systems integrators and others.
Since 2001, Ektron Tech's family of products has evolved and grown—with tools and solutions that enable our customers to take advantage of advanced technology.
At Ektron Tech, we believe in the importance of listening to our customers and of continually extending and improving on our solutions. We remain committed to being the leading provider of management solutions to enable mid-size organizations to more effectively manage and publish information while leveraging the in new, more powerful ways to support their business goals.
Ektron In The News
Ektron In The News
RSS Widget
Feed URL:
http://news.goog
Cancel
Save
© EktronTech 2008 Site Map
Web Page SEO

18. Publish your changes from the PageBuilder menu bar.



After you publish your page from the file menu, you can go to your browser page and enter the following URL: `http://localhost/EktronTech/My_Web_Page/`

Unit 41 – Multivariate Testing

Reference: "Multivariate Testing"" in the *Ektron CMS400.NET Reference Manual.*

What is it?

Simply put Multivariate Testing method (or multi-variable testing) compares the performance of content variations in multiple locations on a page.

"Multivariate testing helps determine the optimum page layout for Web pages. By adjusting page layouts, Web site managers increase the number of visitors to a target page. With Ektron CMS400.NET Multivariate Testing, these adjustments occur automatically and the optimal page layout becomes the actual page web site visitors see."

Why Use it?

Launch campaigns with multiple landing pages and determine which one works best with Ektron multivariate testing. Leverage widget-based PageBuilder technology to automate the process and maximize you results, fast.

Old way was complicated and costly

1. One form of multivariate testing is done through Page Tag (metadata); a complex process where the website creator inserts Javascript into the site to learn about visitor behavior.
2. Another form of multivariate testing is done with or without the need for page tagging called a non-intrusive approach. This approach uses a solution that is hosted externally $$ as software as a service (SaaS) or run internally within an enterprise's own datacenter.

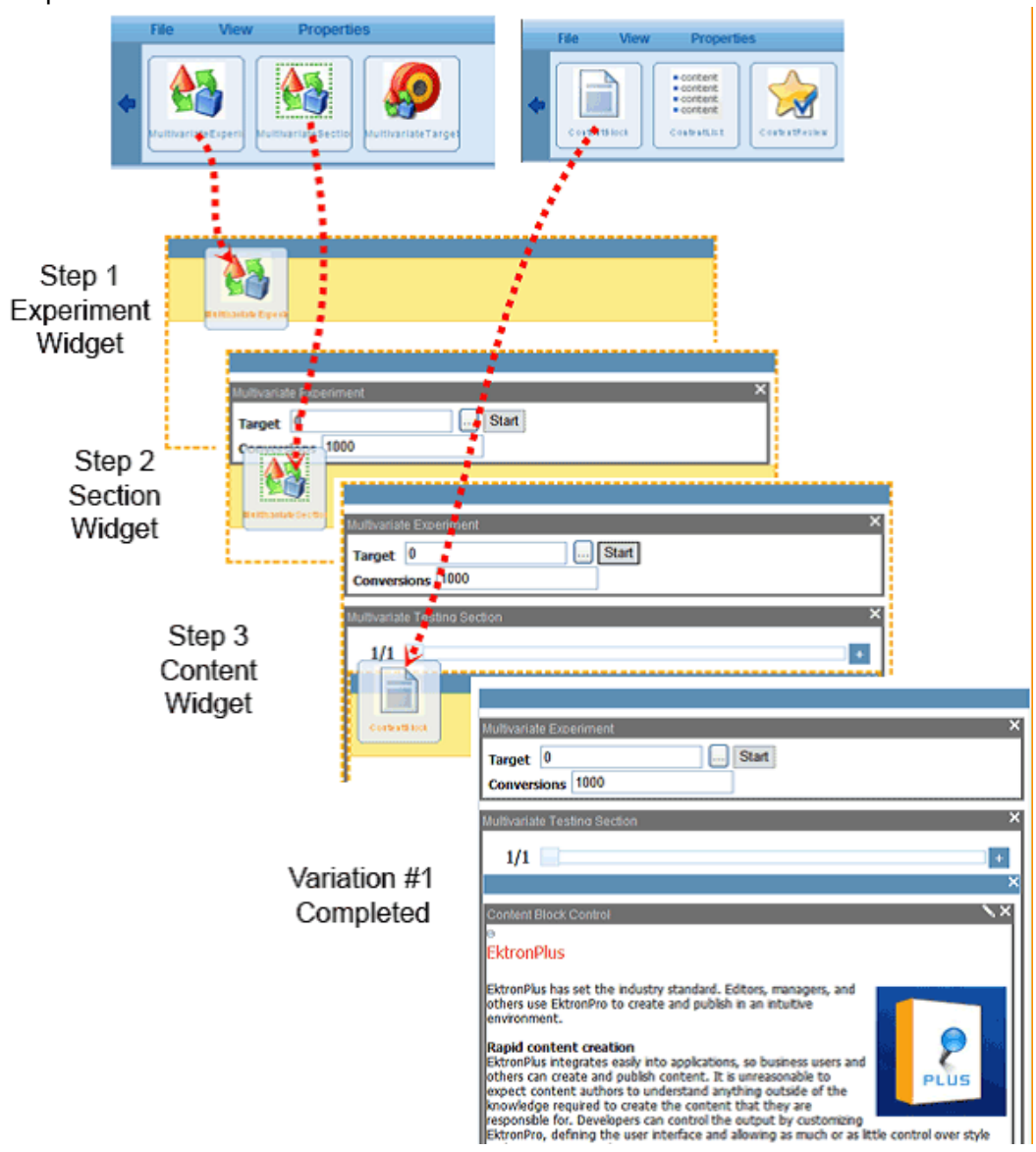
What can you track?

- Headlines
- Images
- Copy Placement

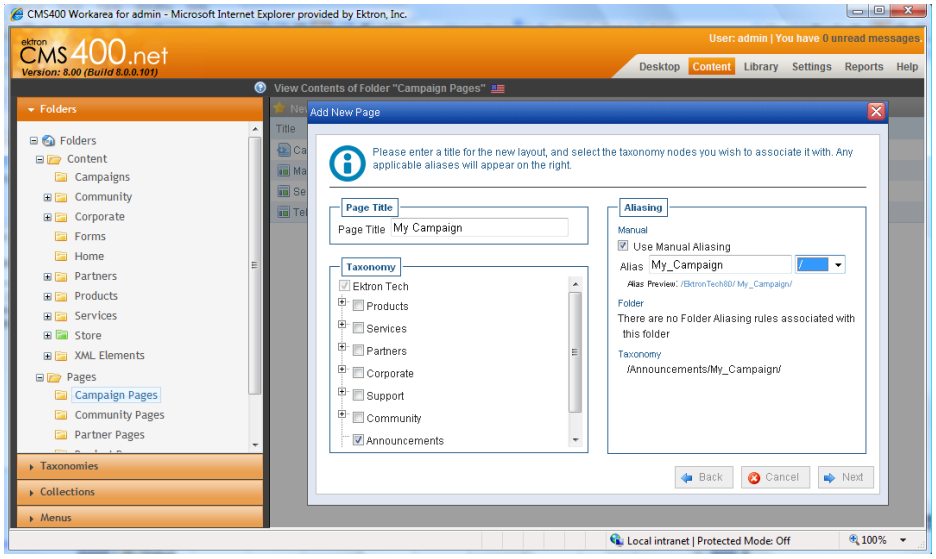
Exercise 40-1: Multivariate Demonstration

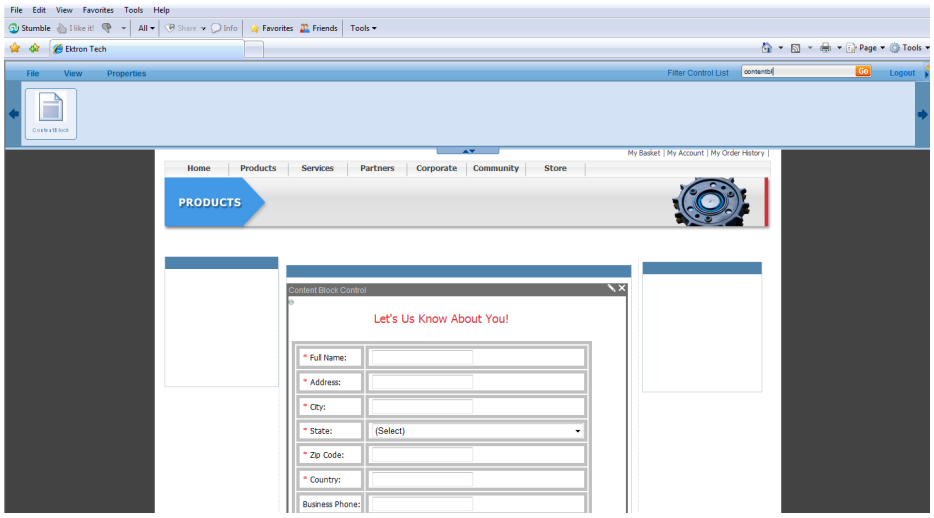
Widget Name	Page Used	Description
Multivariate Target WIdget	Target Page	When a page view occurs on a page containing this widget, the conversion count is increased.
Multivariate Experiment Widget	Experiment Page	This controls the experiment. Settings include the target content number, start/stop button and the Report hide/show button. This is only available when logged in and editing the PageBuilder experiment page.
Multivariate Section Widget	Experiment Page	This widget allows you to drag and drop various content widgets into it. These produce the variations used during the experiment. A slider control selects each specific content used in the variations. More than one Multivariate Section widget can be used on a page.

Steps

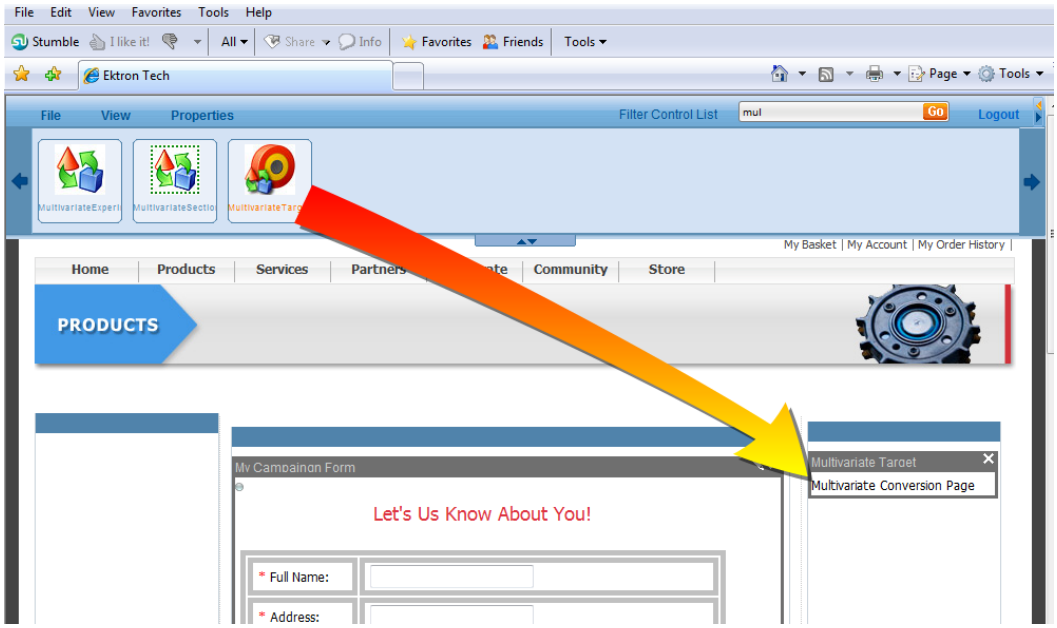

File
View
Properties
Step 1
Experiment
Widget
Step 2
Section
Widget
Step 3
Content
Widget
Variation #1
Completed
Target
Start
1000
Conversions
1/1
Content Block Control
EktronPlus
EktronPlus has set the industry standard. Editors, managers, and others use EktronPro to create and publish in an intuitive environment.
Rapid content creation
EktronPlus integrates easily into applications, so business users and others can create and publish content. It is unreasonable to expect content authors to understand anything outside of the knowledge required to create the content that they are responsible for. Developers can control the output by customizing EktronPro, defining the user interface and allowing as much or as little control over style
PLUS

1. Create or edit the PageBuilder page you wish to use during the experiment.



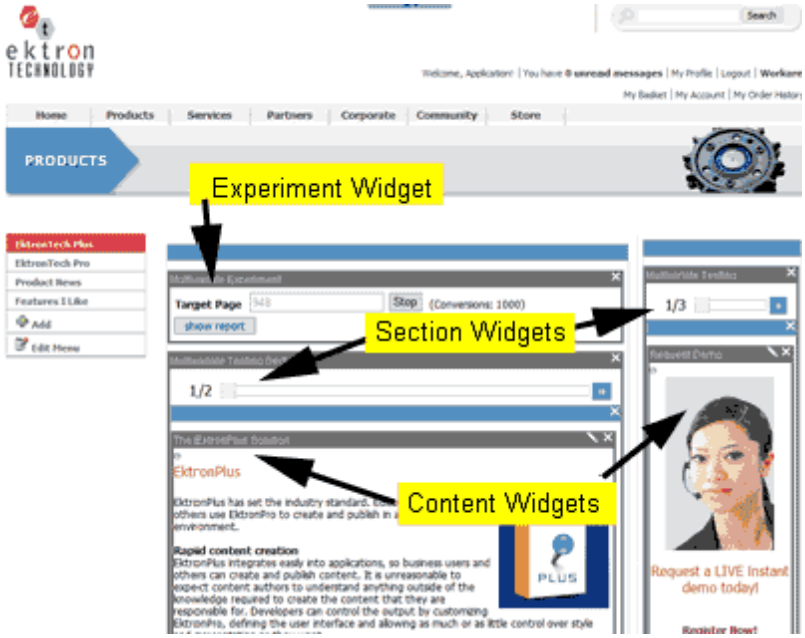


2. Place the Multivariate Target widget in any location on your web page.



Save The Page

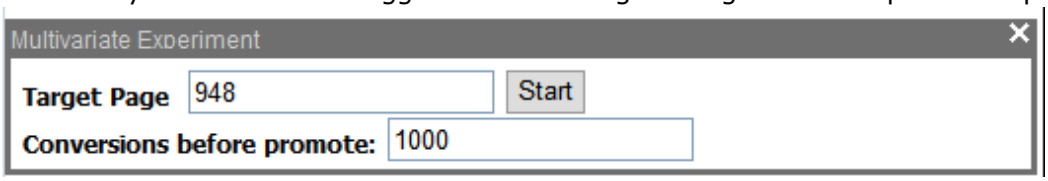
3. Create The Experiment Page



Exercise 40-2: Experiment Widget

This controls the experiment. Settings include the target content number, start/stop button and the Report hide/show button.

This is only available when logged in and editing the PageBuilder experiment page.



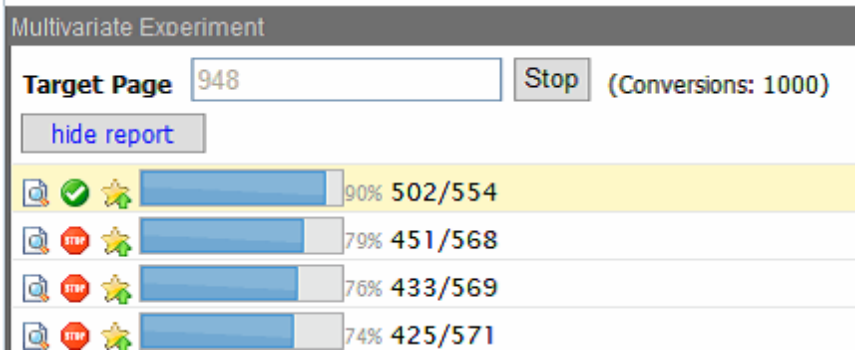
Below is an example of a Multivariate Experiment widget while an experiment is running. If desired, you can click the Stop button to stop the experiment.

The experiment widget also shows reports to indicate how each variation has performed during the experiment.

Click the **Show Reports** button to see the experiment's progress.

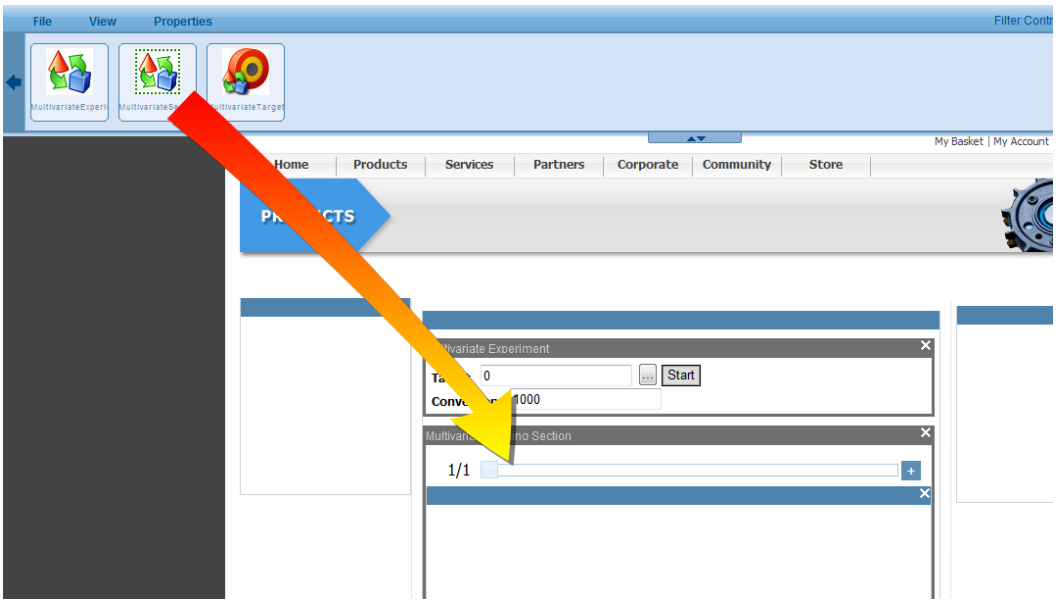
The reports show:

- The percent conversions compared to visits
- The number of conversions
- The total number of visits to each variation

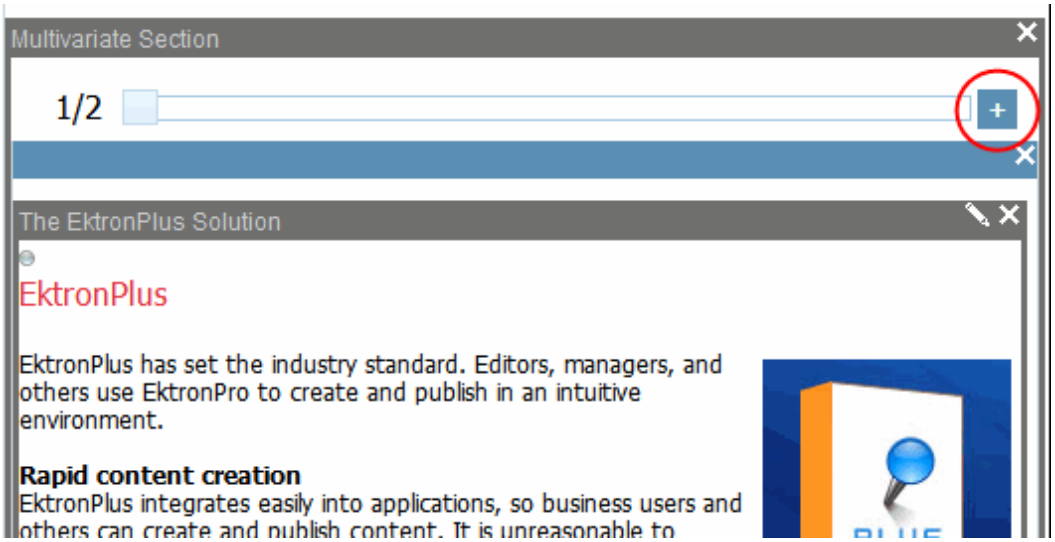


Exercise 40-3: Multivariate Section Widget Details

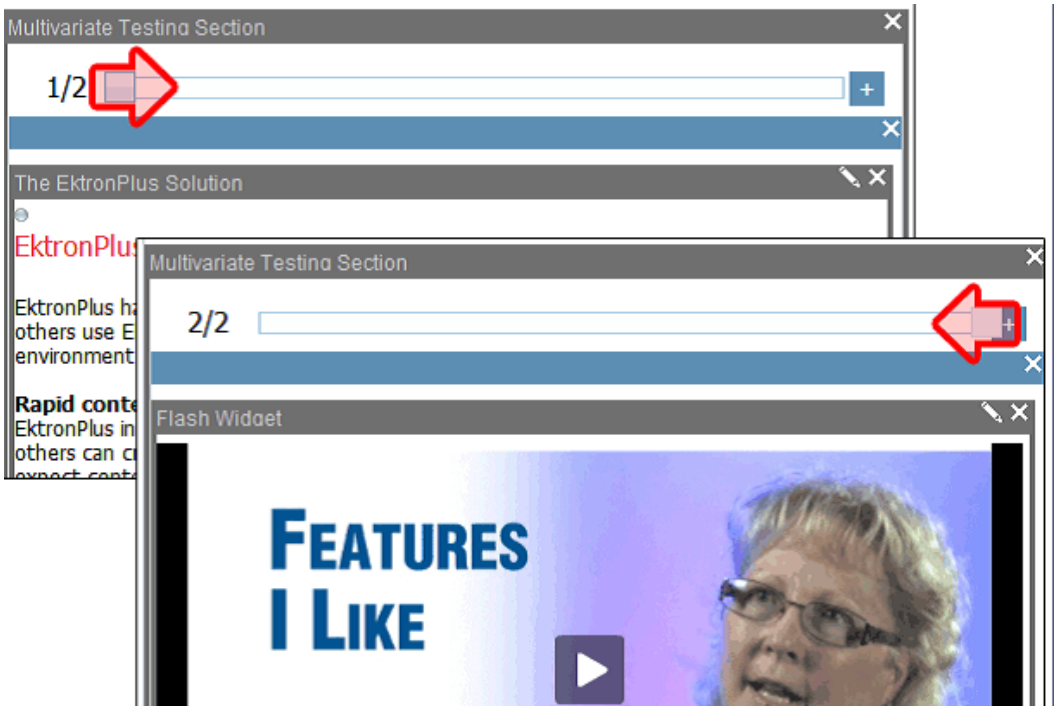
The Multivariate Section widget contains the content variations for the experiment. By using a variety of content combinations, the experiment tests the best arrangement of content to accomplish the desired conversion goals. The content is presented randomly to the site visitor.



1. Drag a content Block Widget into the Section Widget


Multivariate Section
1/2
The EktronPlus Solution
EktronPlus
EktronPlus has set the industry standard. Editors, managers, and others use EktronPro to create and publish in an intuitive environment.
Rapid content creation
EktronPlus integrates easily into applications, so business users and

2. Then Click the Plus Button on the Right Side and Repeat with desired content
   The examples below demonstrates the slider control for variation 1/2 and 2/2.



Publish the Experiment Page

Issues

- Cookies in Multivariate Testing
- When visitors view the experiment page, a cookie is set in the browser. This cookie indicates the specific variation seen by the visitor. From this point forward, if they next visit the target page, this cookie is read and the proper variation counter is increased.
- A cookie persists forever or until the cookies are removed from the browser cache. The cookie gives a visitor a consistent page variation each time they revisit during the experiment. Visitors that block cookies are not counted in conversions. Also, they see random page variations each time they visit the page.

Note: Multivariate Testing results can seen from http://training.ektron.com/eanalytics.

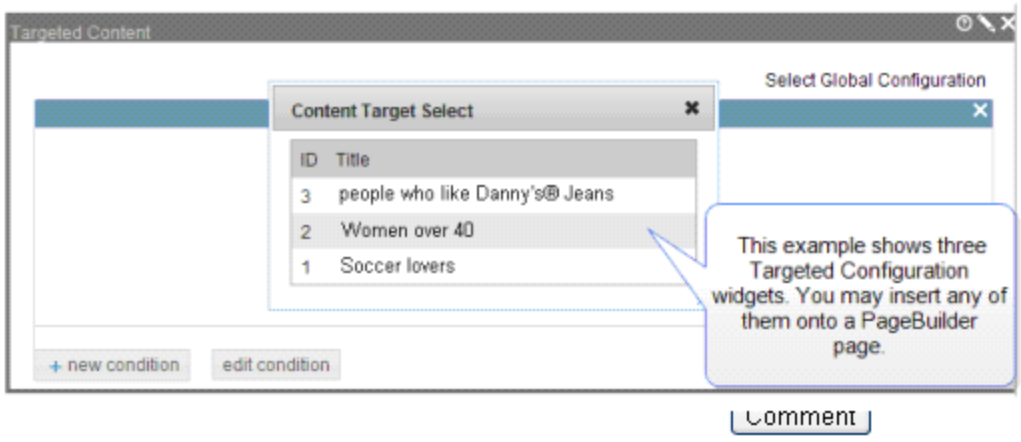
Unit 42 – Targeted Content Widget

Configurations

A Targeted Content Configuration is a Targeted Content widget that you create and store in the Ektron CMS400.NET Workarea. Then, when dropping a Targeted Content widget onto a PageBuilder page, you can select the configuration. The advantage of a configuration is that it lets you reuse the same Targeted Content widget on any number of pages.

Using Targeted Content Configurations

A Targeted Content Configuration is a Targeted Content widget that you create and store in the Ektron CMS400.NET Workarea. When users drop a Targeted Content widget onto a PageBuilder page, they can select from any of the configurations defined in the Workarea. (See the following example.) A configuration lets you reuse the same Targeted Content widget on any number of pages.


Targeted Content
Select Global Configuration
Content Target Select
ID Title
3 people who like Danny's® Jeans
2 Women over 40
1 Soccer lovers
This example shows three Targeted Configuration widgets. You may insert any of them onto a PageBuilder page.
+ new condition
edit condition
Comment

If you later change a configuration setting, all widgets using that configuration are automatically changed.

Use the Targeted Content Configuration screen to create, store, edit and delete configurations.

Important: If you apply no conditions to a configuration and reference it in a Targeted Content widget on a PageBuilder page, nothing appears on the page.

This screen lets you create a new Targeted Content Configuration or edit an existing one.

Creating a Targeted Content Configuration

If you have created a Targeted Content widget, the process of creating a Targeted Content Configuration is almost identical.

Prerequisite: To access this screen, you must be a member of the Administrators group or be assigned the Personalization Admin role.

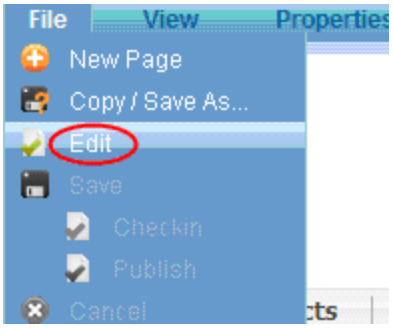
To create a Targeted Content Configuration, follow these steps.

1. In the Ektron CMS400.NET Workarea, choose Settings > Personalizations > Target Content Configuration.
2. Click Add. The Add Target Content Configuration screen appears.
3. Enter a Title.
4. Complete the steps to create a Targeted Content Configuration.
5. Click Save.

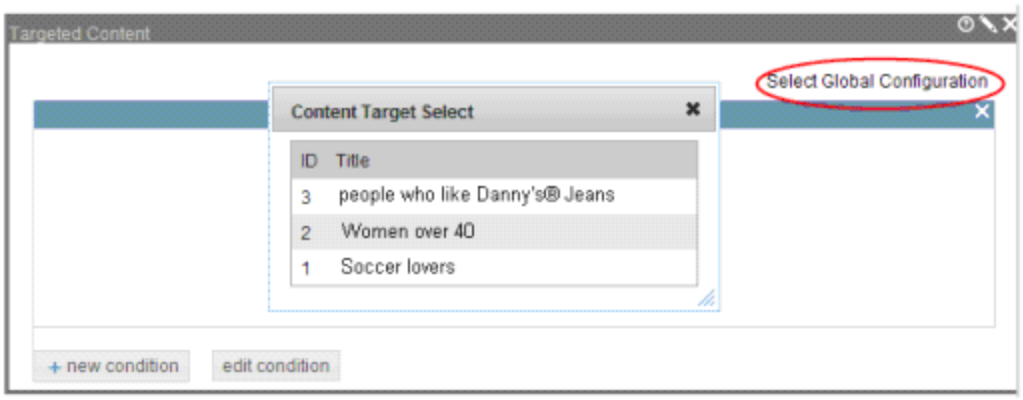
Referring to a Targeted Content Configuration

Prerequisite: The PageBuilder page must include the Targeted Content widget.

1. Edit a PageBuilder page, as shown below



2. Drag and drop a Targeted Content widget.
3. Click Select Global Configuration (circled in the following figure).
4. Select the Targeted Content Configuration you want to place on the page.



5. Save, check in, or publish the page.

Note: You can apply a global configuration to an existing widget. If you do, the global configuration replaces all conditions and results you previously applied.

Editing a Targeted Content Configuration

If you edit a Targeted Content Configuration that is placed on one or more PageBuilder pages, they will reflect the edit after you publish the page.

Prerequisite: To access this screen, you must be a member of the Administrators group or be assigned to the Personalization Admin role.

1. In the Ektron CMS400.NET Workarea, choose Settings > Personalizations > Target Content Configuration.
2. Click Edit to the left of the configuration you want to edit. The widget appears.
3. Edit as necessary. See Also: Creating a Targeted Content Widget
4. Click Save.

Deleting a Targeted Content Configuration

Important: If you delete a Targeted Content Configuration that was placed on one or more PageBuilder pages, they display a blank area where the widget was dropped.

Prerequisite: To access this screen, you must be a member of the Administrators group or be assigned to the Personalization Admin role.

1. In the Ektron CMS400.NET Workarea, choose Settings > Personalizations > Target Content Configuration.
2. Click Delete.
3. Check the box to the left of the configuration you want to delete.
4. Click Delete .

Creating a Targeted Content Widget

To create a Targeted Content widget, follow these steps.

Prerequisite: The Targeted Content widget must be on the list of widgets assigned to the page's template. See Also: Adding the Wireframe and Widgets into the CMS

1. Drag and drop the Targeted Content widget onto a PageBuilder page.
2. By default, Condition 1 is added to the widget. Click Edit Condition.

Show me.

3. Give the condition a name.
4. Click the +or button to set up the first condition.
5. A dropdown list of condition criteria appears.

The following table describes the criteria options.

Criterion	Use this criterion to specify widgets that will appear if
Search Engine Or If the search engine from which the site visitor was referred is one of the following - Google - Bing - Yahoo - Other - None Or If the search engine's keywords are (are not, contain, start with, or end with) a specified value	If the site visitor was referred to this page from any search engine (or not)
Referring URL This is helpful for determining the site from which a visitor came to your site, such as a Facebook fan page.	The referring host matches a string value (for example, www.e-xample.com).
URL parameter For example, you create a campaign selling gold jewelry and base its content on the URL parameter cid=gold.	The current page contains the specified URL parameter.

If the URL of the page that hosts the Targeted Content widget contains cid=gold (for example, http://ww-w.mystore.com/product.aspx?cid=gold), then display widgets assigned to that Targeted Content widget.	
Cookie Cookies are generally stored as name value pairs, such as UserID - A9A3BECE0563982D. When checking for a cookie, you complete three fields. cookie ID logic (is, is not, contains, starts with, ends with) a value For example, if a certain campaign placed cookies begin-ning with A9A, you would set up the criterion like this: Note: The cookie criterion does not support subkeys, such as ecm.userid orecm.sitepath. To work around this problem, use a contains operator and enter the text following .ecm, such as sitepath.	A cookie matching the specified pattern is found on the site visitor's computer.
Device Configuration To learn about Device Configurations, see Adding a Device Configuration andSupporting Mobile Devices.	The user's device matches a Device Configuration that you specify. For example, a content block displays only if a user accesses your Web site with a Smart Phone.
Logged in	The user is or is not logged in.
User is in group User is member of a Ektron CMS400.NET User or Mem-bership Group that you select from dropdown list. See Also: Membership User Groups, Managing User Groups	Note: Only applies to logged-in users.
User is in community User is a member of an Ektron CMS400.NET Community Group that you select from dropdown list. See Also: Com-munity Groups	Note: Only applies to logged-in users.
User Properties The value of the logged-in user's custom property satisfies the logic for the value you specify. See Also: Custom User Properties Example: Zip code is a Custom User Property. You want to display a list of stores in New Hampshire for users whose Zip Code begins with 03.	Note: Only applies to logged-in users.

Condition / result
Zip code = 03458 true
Zip code = 02103 false

Date and Time: Day

The actual date (according to the web server's clock) and a date you enter satisfy the specified logic.

Logic operators:
is
is not
less than
greater than
equal to or less than
equal to or greater than
Examples:
Assume today's date is 2010-01-01
Condition / result
Date = 2010-01-01 true
Date < 2010-01-01 false
Date >= 2009-12-01 true

Date and Time: Day of Week

The current day (according to the web server's clock) satisfies the specified logic.

Logic operators:
is
is not
Examples:
Assume today's date is 2010-03-01 (Monday)
Condition / result
Day of week is Monday true
Day of week is Tuesday false
Day of week is not Tuesday true

Date and Time: Day of Month

The actual date (according to the web server's clock) and a date you enter satisfy the specified logic.

Logic operators:
is
is not
less than
greater than
equal to or less than

equal to or greater than
Examples:
Assume today's date is 2010-03-01 (Monday)
Condition / result
Day of month is 01 true
Day of month is not 01 false
Date >= 2009-12-01 true

Date and Time: Hour of Day	The actual hour (according to the web server's clock) and number between 1 and 23 you enter satisfy the specified logic. The numbers are based on a 24 hour clock so, for example, 5 p.m. is 17.

Logic operators:
is
is not
less than
greater than
equal to or less than
equal to or greater than
Examples:
Assume current time is 18:30:00
Condition / result
Hour of day is 18 true
Hour of day is 23 false
Hour of day >= 12 true

User Regional Info This information is retrieved from the IP address of the person who is using your Web site. In order to retrieve this information, you need to enable eWebEdit400's Targeting Content with GeoIP Information.	Enter the user's country or state, or both. State selections are limited to states in the United States.
Facebook Info For example, if the criterion is Marital Status is Single and the user's Facebook Profile matches that value, display the assigned widgets.This criterion only works with users who log in via Facebook Login. You can apply any of these facebook fields. Age	If the criterion matches information in the user's Facebook profile, display the widgets inserted into this condition.

Gender Marital Status Likes Employment Use Contains with Free Text Fields On fields that use free text (such as Likes), Ektron recommends using the containsoperator, as opposed to is or is not. Contains is more flexible and finds a partial match. For example, if the user likes U.S. Soccer and you enter the term soccer and thecontains operator, a partial match is made, so the user sees the related widget. On the other hand, if the user likes U.S. Soccer and you enter the term soccer and the is operator, an exact match is not made, so the user does not see the related widget. The Likes Field The Likes field lets you search through users' Facebook profile Likes and Interests. Or, you can narrow it down to a specific like/interest. For example, you could display a widget promoting Red Sox merchandise if, in their Facebook profile, users like a Sports Team that contains Red Sox.	
Otherwise Note: You would typically use this criterion last, since it always evaluates to true. Any conditions below this are ignored.	No condition evaluates to true.

6. Add additional criteria as desired. Click the Save button.

7. Drag to the area below the new condition one or more widgets that appear if the condition evaluates to true.

8. If the widget requires you to fill out properties, click the edit button ( ) and complete the screen.

Device Detection

The Targeted Content widget can detect the site visitor's device and only display a widget if it is on a configuration list. So for example, a certain content block would only display if a user is accessing the page from a smart phone.

Facebook Integration

The Targeted Content widget lets a widget designer use the following Facebook information as criteria: Age, Gender, Marital Status, Likes, Employment. For example,

you could display New York Yankees' merchandise to users who "like" the Yankees their Facebook profile.

GeoIP Integration

The Targeted Content widget lets a widget designer use geographic information as criteria. You can use either a country or a state within the United States. For example, your eCommerce Web site is having a special on snow blowers. That content only appears to people in Northern states.

Unit 43 – eSync

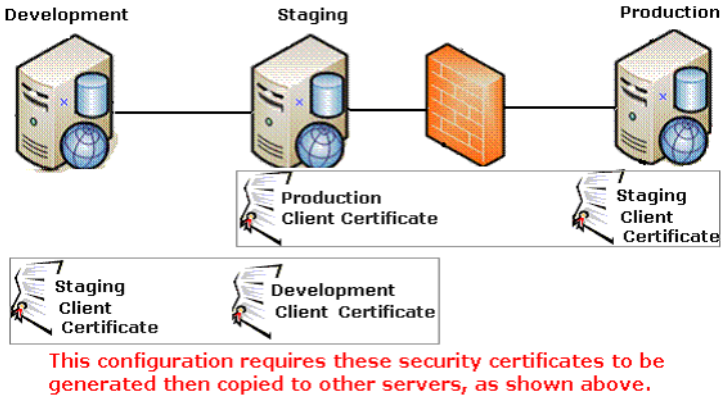
Reference: the "eSync" in the *Ektron CMS400.NET Reference Manual.*

(Included in Enterprise edition and optional in Professional Edition)

Ektron CMS400.NET's eSync automates the process of synchronizing content, folders, or an entire Web site between two servers. Synchronization is a process which ensures that information on two computers is exactly the same.

Certificates

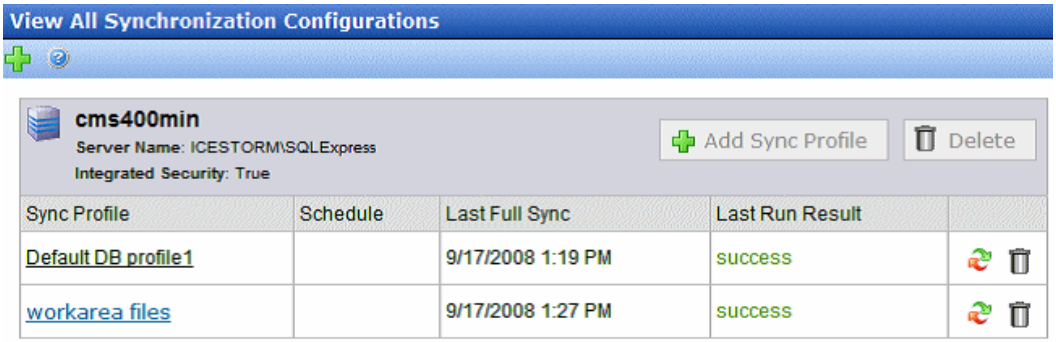
During the setup process, certificates that allow access between servers must be created and installed in the proper locations.


Development
Staging
Production
Production Client Certificate
Staging Client Certificate
Staging Client Certificate
Development Client Certificate
This configuration requires these security certificates to be generated then copied to other servers, as shown above.

Setup and Usage

You administer eSync through Ektron CMS400.NET's **Workarea >Settings > Configuration > Synchronization** screens. The screens let you establish a sync configuration between two databases, then specify any number of sync profiles for each configuration.

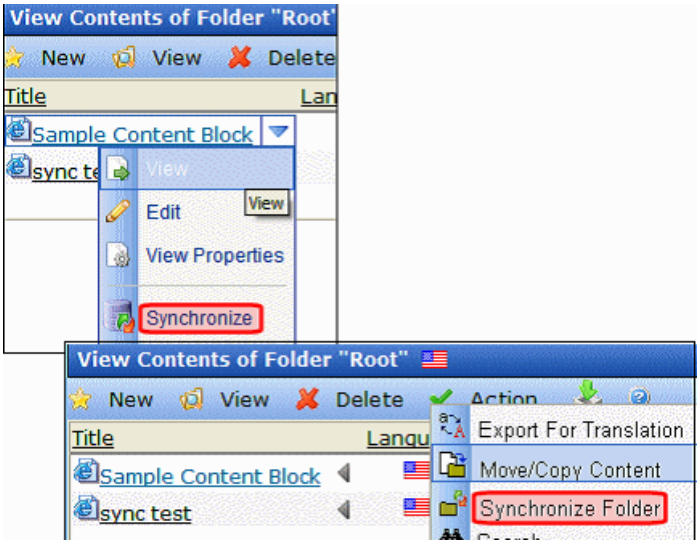
Initial Sync complete



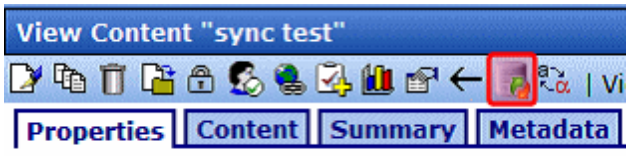
Prerequisites for Content/Folder Sync

- You are a member of the Administrators group or assigned to the Synchronization Admin role
- Content/folder sync is enabled in web.config.
- The server has a sync configuration whose initial sync has been run
- Existing folders: folder information has not been updated since the last database sync using the selected profile. If any folder property is changed (for example, a new meta-data value is assigned), a database sync must be run before you can synchronize content in that folder and the folder itself. Furthermore, any child folder (and its content) that inherits that property from the parent folder can only be synchronized after the next data-base sync.
- New folders: a database sync must be run before you can synchronize content in the new folder and the folder itself.
- Content: No new tags or taxonomy categories have been added since the last time the selected profile was synched. If either event has occurred, a database sync must be run before you can synchronize that content.

Using Content and Folder Level Sync

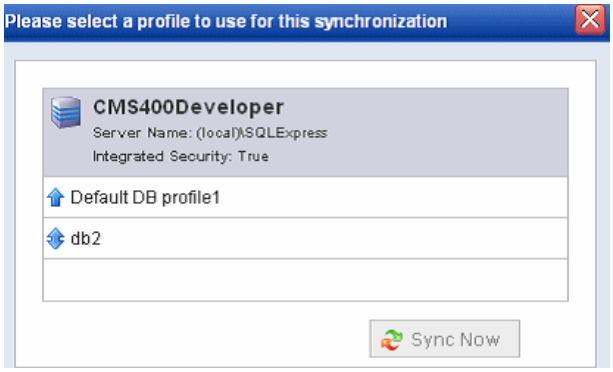


1. Navigate to the content.
2. Click the arrow to the right of the content to see its dropdown menu. Also, a Synchronize button (shown below) is also available from the View Content screen.



3. Click **Synchronize**.

4. All profiles that sync the database in a bidirectional or upload direction appear. Select the appropriate one.



5. Click **Sync Now**.
6. The content is synchronized with the selected database.

Note: If you performed a database sync and the site being synched uses URL aliasing, you must go to its URL Aliasing Configuration screen and click the Refresh button ( ) to update its aliasing information.

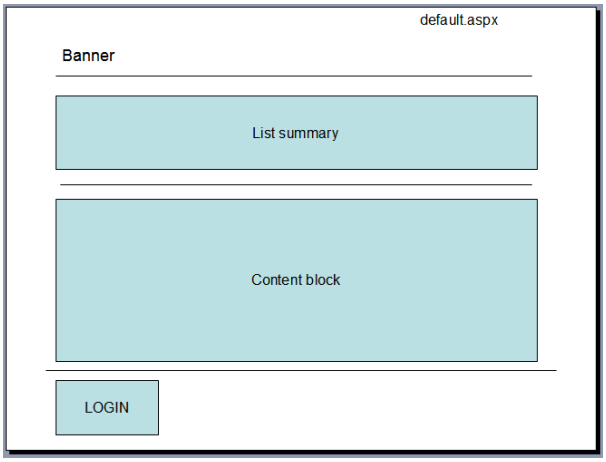
Unit 44 – Building Your First Web Site and Templates

The purpose of this exercise is to teach the administrator the basics of creating masterpages and templates. Additionally, they will become familiar with Visual Web Developer Express and how Ektron Server Controls are placed on a page to interact with the CMS400.NET Workarea.

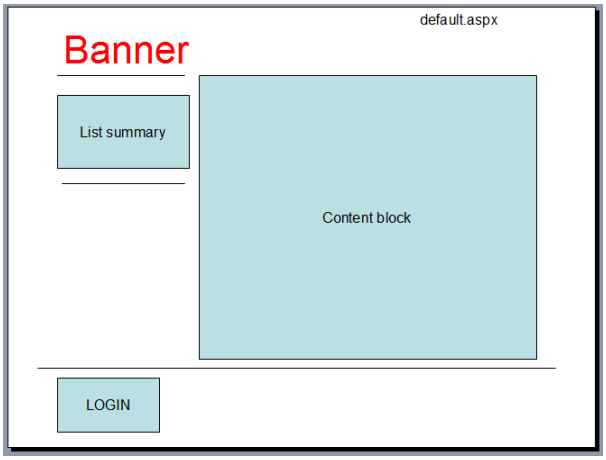
The process

- Create a design
- Install the CMS400.NET min site
- Create the folders and content within the CMS
- Create the Masterpage
- Create the Template
- View the results in a browser!

The Design for Masterpage and Template - Version 1



Design version 2 - Adding CSS styles



Appendix A - CMS Diagnostics

CMS Diagnostics Tool

To access the CMS Diagnostics, go to:
`http://localhost/CMS400Developer/WorkArea/diagnostics/status.aspx`

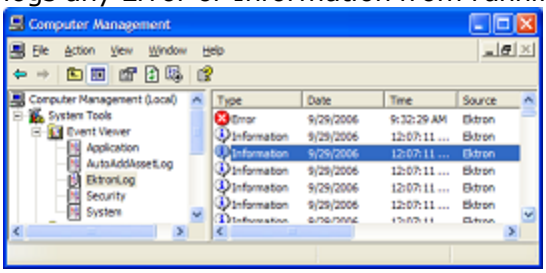
The diagnostics will help you narrow down the cause of errors on your site. It will also reduce troubleshooting time when you contact Ektron Support.

When everything is running fine, you should see OK next to all the fields that this tool checks.

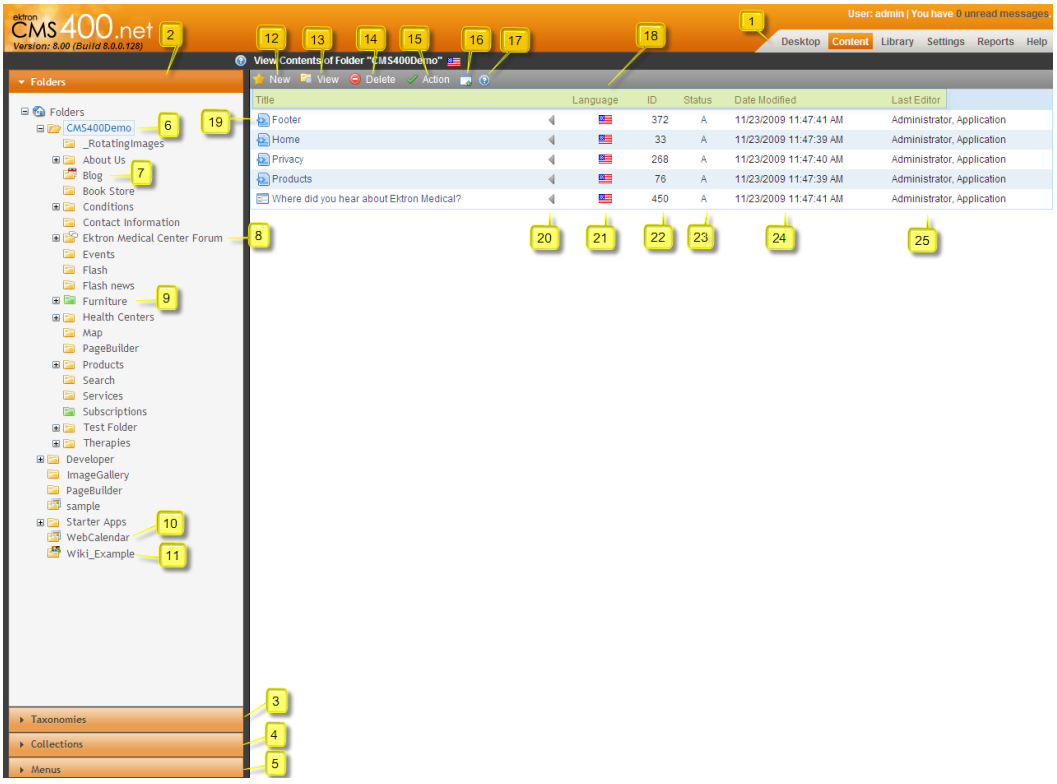
Any thing failed means you need to fix it.

EktronLog

The other place CMS administrators or IT personnel can find information about CMS is from the Event Viewer. There is a separate log called EktronLog which logs any Error or Information from running the Ektron CMS.



Appendix B –Workarea/Editor Cheat Sheet Version 3.0



1. Workarea Tabs
   - Desktop smart personalization desktop
   - Content Locate folders, contents, DMS, taxonomies, collections and menus
   - Library Content folder structure, stores images, files , hyperlinks and quicklinks
   - Settings Manage CMS Settings based upon permissions
   - Reports Content reports and Site analytics
   - Help In Workarea and in context help section

- Content Tab Types

  2 - Folder Tab Select to view folder architech structure of CMS

  3 - Taxonomy Tab Select to view Taxonomy Structure and options

  4 - Collections Tab Select to view Collections and options

  5 - Menu Tab Select to view Menus and options

- Folder Types

  6 - Content Folder Regular folder for contents, select to view contents in that folder.

  7 - Blog Folder Select to view the posts and comments on this blog.

  8 - Forum Folder Select to view the discussion forums, categories, topics, and replies.

  9 - eCommerce Folder Select to view the ecommerce items

  10 - Calendar Folder Select to view and plan events on the calendar

  11 - Community Folder Folders for membership uses to edit content, select to view contents.

- Dropdown Menus

  12 - New menu Create new content, forms documents, Folders menus and collections

  13 - View menu View Language, Properties and archived content and more.

  14 - Delete menu Used to delete multiple items. Administrators can delete folders.

  15 - Action menu Export for translation, Search, move/copy content, eSync

  16 - DMS/ Add asset Pop up the window for drag and drop documents from local machine.

  17 - In Context Help Click to get in context help anywhere in the workarea

  18 - Content Organization Bar Ability to sort content by the title

- Content Types

  19 - Content Items Can be HTML Content, Forms, DMS, or Multimedia Content

  20 - Quick Edit Menu For content editing, properties and content esync.

  21 - Language Flag Indicate the content language version.

  22 - Content ID Automatically generated by system.

  23 - Content Status Shows the current status of a piece of content.

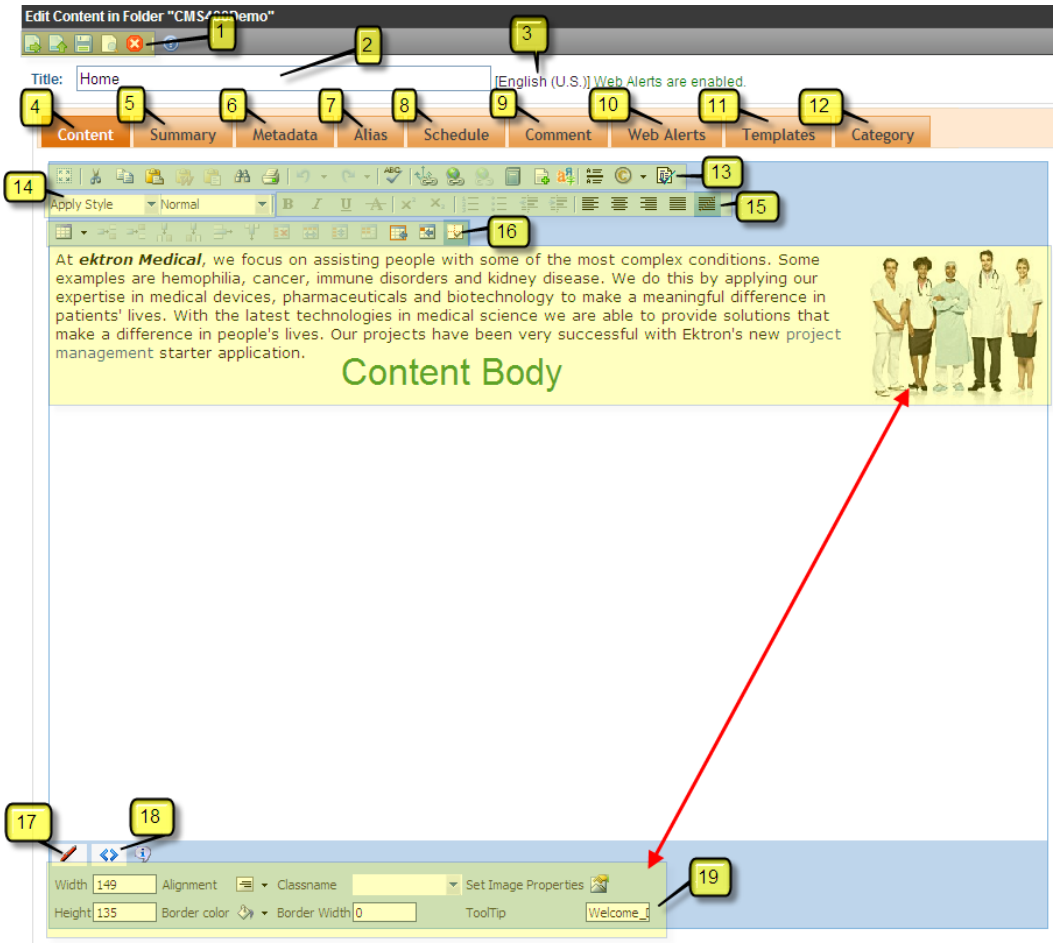
    - (A) Approved Published and on the website.
    - (O) Checked Out Only available for editing by the content editor who checked it out.
    - (I) Checked In Available for editing.

- (S) Submitted Currently in the approval chain. Waiting for acceptance.
- (M) Deletion Marked for deletion.
- (T) Awaiting Tasks Currently awaiting completion of tasks.
- (P) Pending Awaiting scheduled start date.
- (D) Pending Deletion Pending deletion but created with a future start date.

24 - Date Modified Last modified date of the content.

25 - Last Editor Editor who made the last modification.

eWebEdit400 Cheat Sheet



1. Content Options (From left to right)
   - Publish / Submit – Saves changes, closes editor, and (depending on approval rights) either publishes the content or submits it to the next person in the approval chain.
   - Checkin – Saves changes, closes editor, checks in the content, but does not publish or submit for approval.
     Note: Use this to create a record in the history, and to allow other content authors to edit it.
   - Save – Saves changes; does not submit into the approval chain, check content in or even close the editor.
   - Preview- Allows you to preview the content as it would look in context.
   - Cancel – Discards changes, cancels check out.

2. Title – The CMS title for the current block of content.
3. Language – Indicate the content language.

Tabs

4. Content Tab – Default tab; select to view/modify the main body of content.
5. Summary Tab – Click this tab to view/modify the brief summary of a content block.
6. Metadata Tab – Click this tab to view/modify metadata values related to this content block. Used for search engine optimization, advanced search/navigation, content relationships, etcetera.
7. Alias Tab (Optional) – Click to create alias (friend URL) for content.
8. Schedule Tab – Click this tab to view / set the go live and end dates for this content block, and the action taken when the end date occurs.
9. Comments Tab – Click this tab to view/modify a comment viewable by content authors/publishers only.
10. Web Alerts (Optional) – Click this tab to modify settings for email notification to subscribers. Administrators set the defaults and identify which folders are included in a subscription.
11. Templates (Optional) – Click this tab to select an alternate template to display this content block. Administrators specify which choices are available / appropriate.
12. Category (Optional) – Click to select taxonomy for content. Administrator specifies the taxonomy can be used in folder properties.
13. Standard Toolbar (From left to right)
    - Select All / Cut / Copy / Paste
    - Paste Plain Text – Paste copied text without formatting.
    - Find and Replace / Print / Undo / Redo
    - Spell Check – Checks content spelling using web based dictionary.
    - Insert Anchor – Creates anchor point within the content.
    - Hyperlink Manager – Insert a hyperlink to anchor link, or modify an existing hyperlink.
    - Remove Link – Remove a selected link.
    - Library – Click to browse the library, allowing you to insert images, links to files/forms, links to other content blocks (Quicklinks), and stored hyperlinks.
    - Add Wiki Link – Create a Wiki link.

- Translate content – Click to open translate content window, providing a machine translation of your content block into one of a handful of languages.
- Horizontal Rule – Inserts a horizontal line.
- Insert Symbol – Insert symbols and special characters.
- Validation – Checks to make sure all HTML is XHTML compliant.

14. Style Toolbar
    - Styles – Select and apply style characteristics to selected content, overriding the default characteristics.
    - Heading – Similar to styles, applies heading characteristics to selected content, or select Normal to remove any formatting to the text.
15. Formatting Toolbar
    - Bold / Italic / Underline / Strikethrough
    - Superscript / Subscript / Number List / Bullet List
    - Outdent / Indent
    - Align Left / Center / Right / Justify / Remove Alignment
16. Table Toolbar – For creating and editing table, column, row, and cell properties.
17. Design View – WYSIWYG view of the content.
18. HTML View – HTML source of the content.
19. Property Screen – display properties based what's been selected in the content body. (Screen shot shows Image Properties of the image select in content body.)

Appendix D - Training your users

Resources

- User Manual
- CMS400 Dev Center, the online community for CMS users - http://dev.Ektron.com

To illustrate the elements of design that relate to the user training, here is a list of questions that need to be answered to plan end user training:

1. Please provide an overview of the installation - what type of site it is, the goals of the project, the timeline of the project, features of the CMS that are especially important, unusual or special requirements of the site, other web applications that are used, etc.
2. What areas of the site or pages have received the most development effort?
3. What are the major types of content on the site?
4. Are there serial content types like press releases or news articles anywhere?
5. What XML content types are used? What XML Indexing searches or lists are used?
6. How does a user add a page to the site? (The answer to this might be "The site isn't designed to allow users to add new pages.")
7. How does a user add a section to the site? (The answer to this might be "The site isn't designed to allow users to add new sections.")
8. How many CMS templates are in the site? How many of these are dynamic and which CMS folders do they relate to?
9. Dynamic Lists:
    a. Where are CMS menus used?
    b. List Summaries?
    c. Archive List Summaries?
    d. Collections?
    e. Other list controls?
10. Is there any content reuse - content appearing on more than one page?
11. How would CMS users create new CMS-managed HTML forms?
12. Are CMS calendars used anywhere?
13. How would CMS users create new CMS calendars?

14. How is CMS metadata used? Would CMS users be editing CMS meta-data values?
15. Is it a multi-lingual site? Which languages are enabled? Who would translate the content?
16. Are there any private content or extranet sections on the site?
17. What CSS styles are available to CMS users and how would each style be used?
18. What general styling guidelines should CMS users follow?
19. Is there a "palette" of HTML snippets for CMS users to cut and paste from?
20. How are CMS permissions set? Are administrator users expected to make extensive changes to permissions settings?
21. What approval processes are set up? Are administrator users expected to make extensive changes to permissions settings?

Topics to Cover

- Business Impact (Note: what users need to know during training often has more to do with your business processes and Web site configuration than the features of the CMS.)
    - What is the CMS?
    - What does the CMS do for your organization?
    - How will the Web site change or what will the new site be like?
        - Site layout
        - Appearance and style
        - New Content
    - How will the users' responsibilities change?
    - Basic demonstration of the CMS
        - Log in to CMS
        - Edit an existing content block
        - Add a new content block
        - Add a hyperlink to the new content block
- Preliminaries
    - Ektron Plugins (ewebeditproclient.exe, ewebdiff.exe, dms400client.exe)
        - Explain that plugins are like Flash Player, etc., and necessary for using CMS

        - How does the user acquire?
            - Auto-install via IE
            - Download or retrieve from network share and run .exe file
            - IT Department will visit and manually install
            - Pushed to clients through .msi or network management
        - In case of problems, who should user contact?
- Basic editing process
    - Describe different parts of the editing screen
    - Staging version versus Published version
    - Change control - check in / check out
    - Difference between three save buttons

Formatting Content

1. Explain formatting rules and guidelines for your site - how do you want your users to format content?
2. Two basic formatting approaches:
    a. Cut and paste
    b. "From Scratch" using editor's formatting features
3. Overview of editing
    a. Word-processor-type features
    b. "Paste text" buttons
    c. Uploading images and files
    d. Creating and editing images
        i. With Ektron's WebImageFX, if you have purchased a license
        ii. Otherwise with Microsoft Paint or another tool available to all users
    e. Web editing techniques
        i. Layout and positioning with tables
    f. Describe the CSS styles that you have created and how users will apply them
4. XML Content
    a. Demonstrate editing and creating each type of XML content
    b. Explain where the XML content is used on the site and how it is displayed
    c. Demonstrate editing and creating each type of XML content

5. Other things you can do with content
    a. Scheduling
    b. Translation
        i. Manual Translation
        ii. Export to XLIFF
6. Permissions - what will particular users be able to do in particular parts of the site?
7. Approval Process
    a. Explain approval process in general
    b. How to check the status of a content block
    c. Show an approval e-mail
    d. Demonstrate logging in and approving changes
    e. Describe the approval processes set up in the different parts of your site
        i. When a user edits content, who will approve those changes
        ii. Will the users attending training need to approve changes made by others?
8. Work Area
    a. Demonstrate how a user would edit their profile
    b. Collaboration Tools
        i. Instant E-mail
        ii. Content Change Control
        iii. Content Approval Process
        iv. History Comments, Task Comments, and Inline Comments
        v. Task Management
        vi. Explain any features of work area you'll want your users to access
9. Closing
    a. Explain your CMS deployment plan and timeline
        i. When will users have access to begin using CMS?
    b. Resources for end users - describe links available in "Help" section of Work Area

Who in your organization should users contact with questions and problems?

Appendix E – E-mail in CMS400.net

E-mail Notification

See Also: "Configuring E-Mail Notifications" in the *Ektron CMS400.NET Setup Manual*.

E-mail notification is sent by the CMS on these occasions:

- A task is assigned to a user.
- A task is redirected to a user.
- A task is submitted for content approval. E-mail is sent to the first user in the approval chain.
- The approval process moves on to the next approver.
- The content is declined at an approval stage. E-mail is sent to the assigned user.
- The content is published. E-mails are sent to the creator, assigned user and the approvers.

Where User Groups are used in lieu of individual users (recommended practice for Approval Chains), all members in the group will be sent notification E-mails. (Note: In order to receive system E-mail notifications, a user must have their E-mail enabled in the User Setup.)

Example 1 – HTML Form E-mail

This E-mail is sent when an HTML form is submitted from the site. The E-mail property must be set on the form for this to be sent when the form is submitted.

From: studentRoger@ektron.com
[mailto:studentRoger@ektron.com]
Sent: Tuesday, May 01, 2007 3:09 PM
To: Roger.kirkhart@ektron.com
Subject: New Student Form

Data from form "Roger Contact Info" was received on 5/1/2007 3:08:33 PM.

Contact information.

Field	Value
Subject	Contact Form
Full Name	Roger
Address	1 street
City	city

State	South Carolina
Zip	11111
Country	usa
Business Phone	603-888-1234
Home Phone	603-888-1234
E-mail Address	roger.kirkhart@ektron.com

E-mail "New Student Form" originally sent to Roger.kirkhart@ektron.com from studentRoger@ektron.com on 5/1/2007 3:08:33 PM.

Example 2 – Content Request for Approval

From: rogerstudent@ektron.com
[mailto:rogerstudent@ektron.com]
Sent: Tuesday, May 01, 2007 1:31 PM
To: roger.kirkhart@ektron.com
Subject: Request for content approval

The content Editor adds new content has been submitted for your approval by editor editor".

To locate the content, the folder path in your workarea is: \CMS400Demo\Test Folder.

The following link will take you to the submitted content block on the Web site:
http://localhost
/CMS400Developer/login.aspx?id=858&LangType=1033
.

Please Note: You must login and select the preview icon to view the changes.

The content was submitted for approval on: 01-May-2007 1:30:46 PM.

Approvals: [approver]

Comment:

Example 3 – Content Approved and Published

From: rogerstudent@ektron.com
[mailto:rogerstudent@ektron.com]
Sent: Tuesday, May 01, 2007 2:49 PM
To: roger.kirkhart@ektron.com
Subject: Content changes have been made

The changes to the content About Us have been approved. The content changes went live immediately.

Example 4 – Content Declined Approval

Content sent for approval was declined and an E-mail was returned to the content author. The content is in a "Checked In" state.

From: rogerstudent@ektron.com
[mailto:rogerstudent@ektron.com]
Sent: Tuesday, May 01, 2007 1:32 PM
To: roger.kirkhart@ektron.com
Subject: Content approval request declined

Your submitted approval request for the content Editor adds new content has been declined by approver approver. Reason: I DON"T LIKE IT.

Example 5 – Membership Approved

Activate Account

From: Training@ektron.com
To: roger.kirkhart@ektron.com

Welcome to the Ektron CMS400.NET Web Alerts system.

You have registered to receive updates from our Web site when content is added or updated.

For security and identity reasons, you must active your account by clicking the link displayed below.

http://localhost
/CMS400Developer
/WorkArea/activateuser.aspx?uid=
jmember&acc=797c9c3297f449e896531cd379900ce0

Make note of your username and password:

Your user name is: roger.kirkhart@ektron.com.

Your account id is: 797c9c3297f449e896531cd379900ce0

Example 6 – Web Alert E-mail Example (including new article text)

From: Training@ektron.com

Sent: Wednesday, June 20, 2007 9:18 AM
To: roger.kirkhart@ektron.com
Subject: Wellness Article Update!!!

You have received this newsletter because you subscribed to it on the Ektron Medical Web site. If you do not wish to receive similar messages in the future, go to the bottom of this page and use the "Unsubscribe" link.

Don't Get Cancer

by: Simon Mitchell, Ektron

One antidote to cancer is information

In general our responses to cancer are converging, but very slowly. Presently all cancer authorities are agreed on only one thing: cancer cannot take hold in a healthy immune system

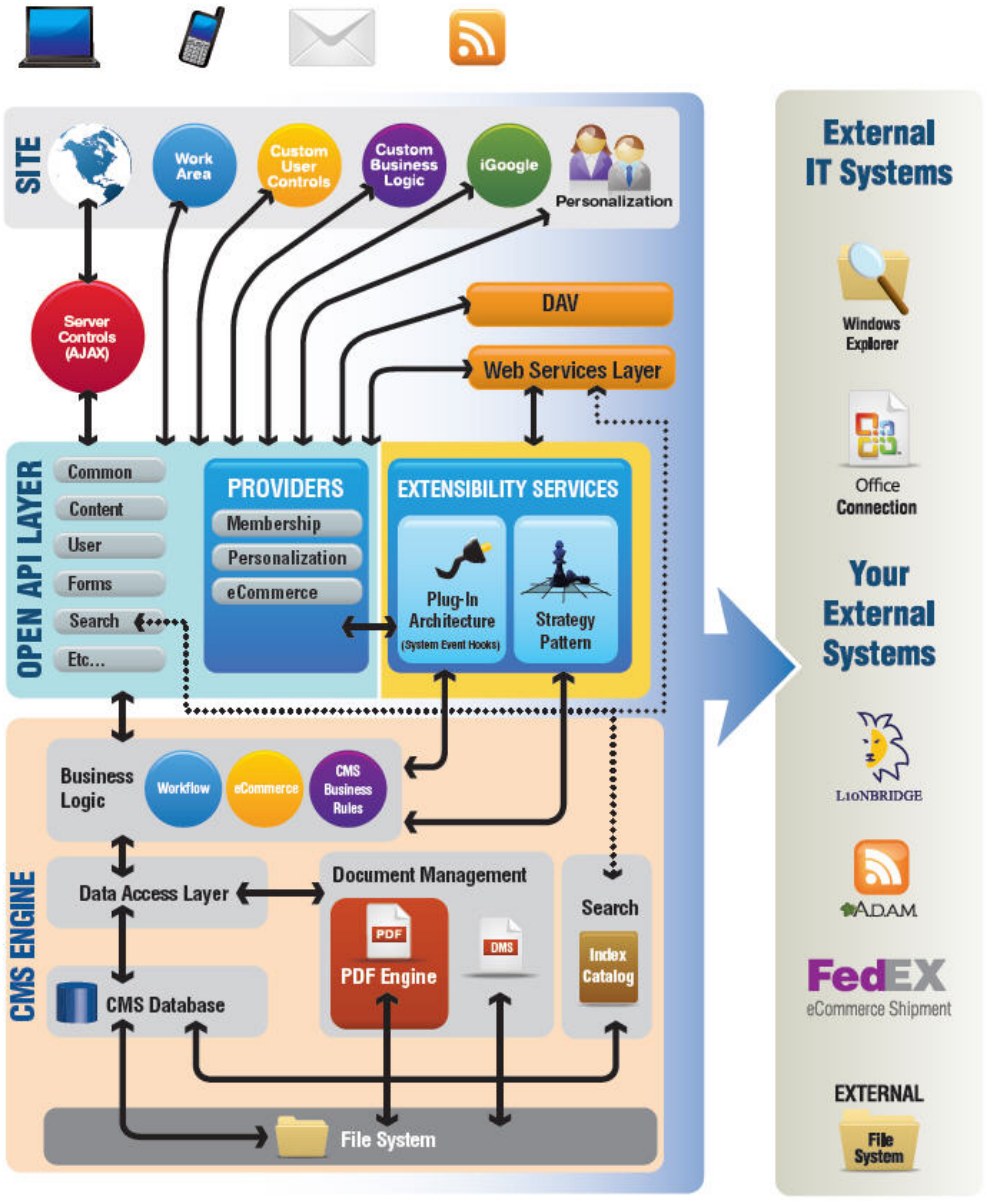
<remainder of article removed for brevity>

Read More: http://localhost/CMS400Developer/wellness_article.aspx?id=119

You have been subscribed to receive E-mail alerts from the Ektron Medical Demo site web alerts system. Follow the link to unsubscribe from these alerts:

http://localhost/CMS400Developer/wellness_alerts_unsubscribe.aspx

Appendix F- System Architecture



Appendix G: New Analytics

Why Use Analytics?

By analyzing the user traffic coming to and interacting with your site, you can better understand key elements of your Web presence. Traditional Web analytics packages help you understand where your traffic is coming from, when the traffic is occurring (including high and low points) and what pages users are interacting with. But this information is often isolated from the Web content and is, therefore, lacking the context needed to take advantage of it.

Ektron CMS400.NET has a fully-developed, Web traffic analytics provider model. By hooking into best-of-breed analytics software, like Google Analytics, your Web site's information is integrated into CMS400.NET's Workarea and so is at your fingertips as you use it to optimize the site experience.

Analytics can help you

- determine the popularity of areas of your site
- examine click-through rates on your calls to action
- analyze site structure and navigation
- obtain key information about your site visitors

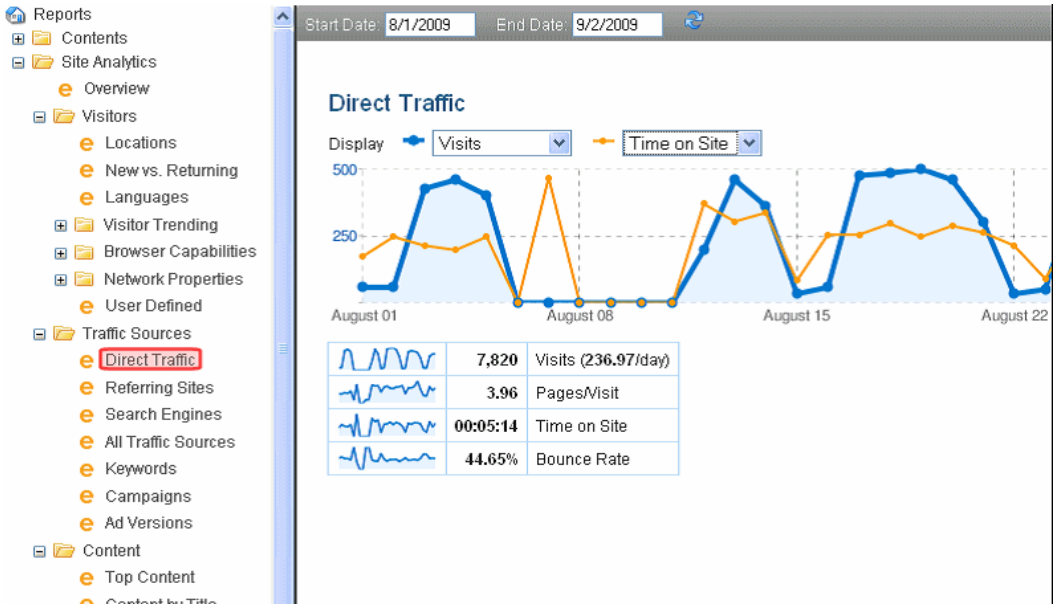
This information is essential to optimizing your site's content. Its seamless integration into CMS400.NET lets you fully leverage the data.

Using Analytics Data within Ektron CMS400.NET

Ektron CMS400.NET's Workarea provides customized reporting, reflecting exactly the information you care about. The data can be broken down in many ways, such as

- number of visits per day
- browser usage
- visitor location
- visitor language
- top content
- referring sites

Analytics data is available for your entire site as well as individual pages. A sample Analytics display is below.



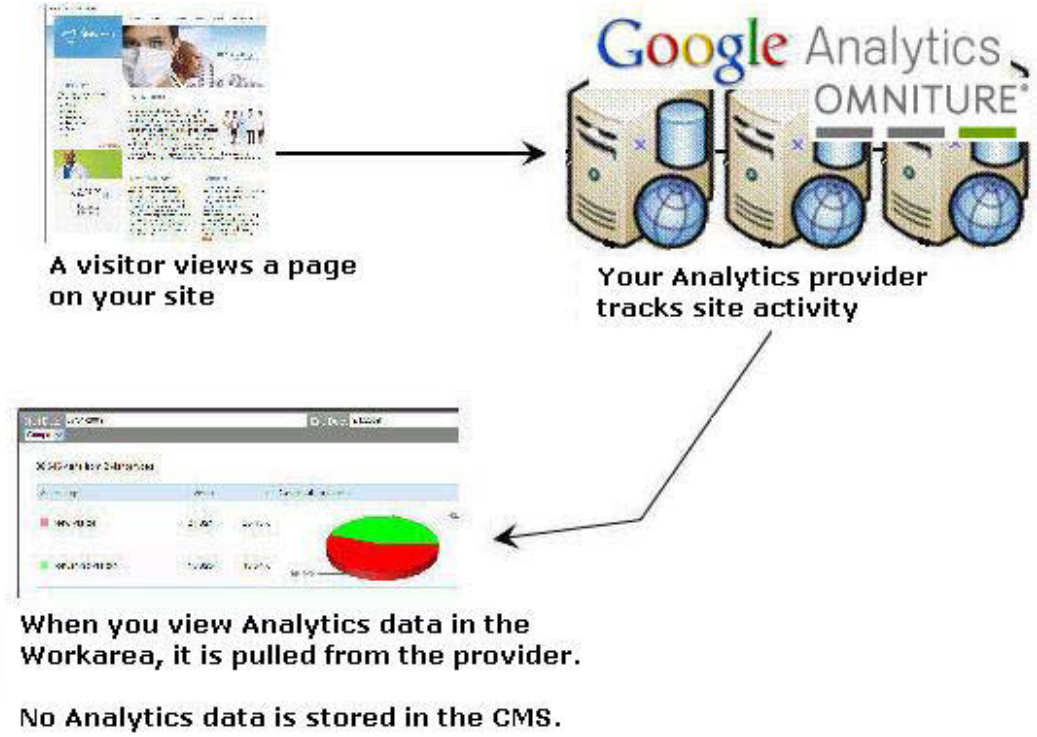
The Analytics widget can be placed on your dashboard, so that you have instant access. Also, the software is integrated into the content history. This makes your traffic analytics more relevant: you can see what modifications were made, when, and how they

impact traffic to that page. You can react immediately, restoring content that performed better or changing the current content to better reflect your goals.

This full integration makes your analysis more efficient; there is no reconfiguration of the analytics tool and no learning curve.

Customer reporting, segmentation, and legacy data are easier to access, and Ektron CMS400.NET becomes the central hub for all of your Web site's information, bringing it together so that it is no longer siloed. Having all information in one place puts it in context, making it easier to draw the conclusions you need to optimize your Web presence.

The Flow of Analytics Data


Google Analytics
OMNITURE
A visitor views a page on your site
Your Analytics provider tracks site activity
When you view Analytics data in the Workarea, it is pulled from the provider.
No Analytics data is stored in the CMS.

As shown above, once you set up Analytics tracking, the Analytics Provider monitors every site visit. In the Workarea, you can view this data from many angles.

Important: No data is stored in Ektron CMS400.NET -- the CMS retrieves it upon demand from your Analytics provider.

Google Analytics Provider

Google Analytics is an enterprise-class, Web Analytics solution that gives you rich insights into your Web site traffic and marketing effectiveness. Powerful, flexible and easy-to-use features let you see and analyze your traffic data in an entirely new way. With Google Analytics, you're more prepared to write better-targeted ads, strengthen your marketing initiatives, and create higher converting Web sites.

Its main features are:

- Advertising ROI - Measure the success of your display, search, new media and offline advertising efforts.
- Cross Channel and Multimedia Tracking - Compare your site usage metrics with industry averages and track Flash, video, and social networking sites and applications.

- Visualizing Data - Uncover trends, patterns, and key comparisons with funnel visualization, motion charts, mapping, and more.
- Customized Reporting - Create the reports, dashboards, and segments that make the most sense for your business.
- Sharing and Communicating - Administration controls and email reports allow you to share data across your organization.
- Google Integration and Reliability - Google Analytics complements a suite of related products, all running on the same world renowned infrastructure that powers Google.

Authorization to View Analytics Data

License Requirements

Ektron CMS400.NET Professional or Enterprise License

User Permissions

Only the following users can view Analytics data.

- Members of the Administrators Group
- Users assigned to the Analytics Viewer role.

Alfred works for ABC Corp and wants to know what the site analytics are used for. He wants to construct a new marketing campaign and wants to know how much traffic is currently looking at the content with the correct subject matter that is already there. This will help Alfred to determine if marketing in this direction would be worth while for his company.

Alfred has two choices on viewing the data on his current website:

Viewing Analytics Data

The Analytics feature provides two basic types of data:

- Page data
- Site data

Page Level Analytics Data

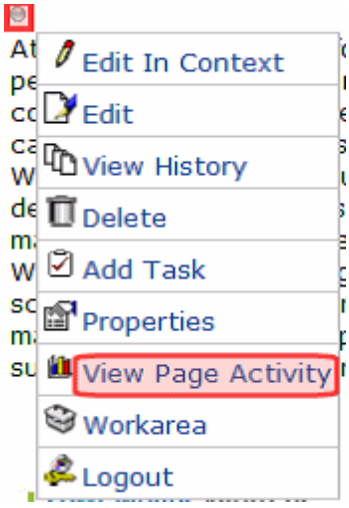
After you enable Analytics tracking, your provider retains data on every visited page (that is, a unique URL) such as http://dev.ektron.com/articles.aspx or http://dev.ektron.com/

template.aspx?id=6572). Data is tracked when the quicklink is used, as well as any alias assigned to the content.

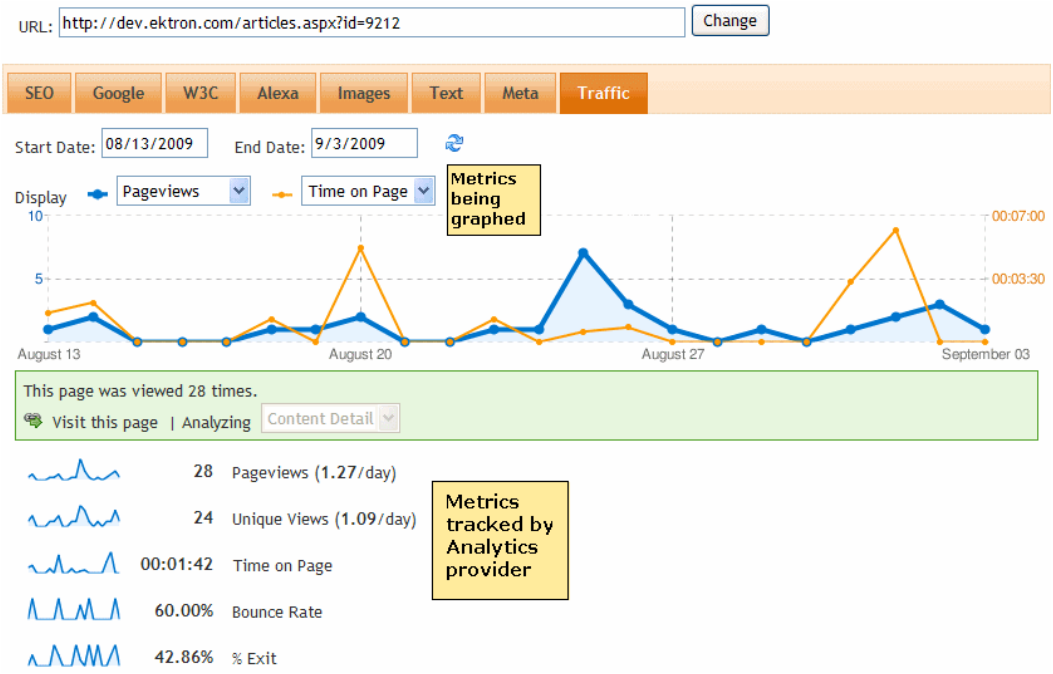
Viewing Page-Level Analytics from the Site

Any authorized user can view Analytics for a page on your Web site by following these steps. Alfred has the correct permissions so how does he view page level analytics? This is how:

1. Log in to the Web site.
2. Navigate to the page whose Analytics data you wish to view.
3. Hover the cursor over the Web Site Content menu.
4. Click View Page Activity, as shown below.



The SEO page's Traffic tab appears.



- Bounce rate - the percentage of single-page visits (that is, visits in which the visitor exited your site from the entrance page) This shows Alfred how many people were looking for information but then decided that his company wasn't a good fit after seeing the first page.
- % Exit - the percentage of site exits that occurred from this Page

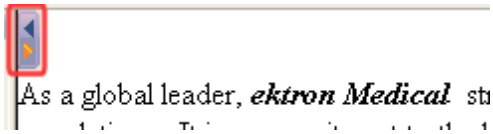
  This shows Alfred how many people left after looking at this particular page and deciding that his company wasn't a good fit. This helps Alfred by showing him how many people were interested in this particular page but then left. Perhaps there was something on the page that was turning customers off to his products that he needs to investigate.

Viewing Page-Level Analytics from a PageBuilder Page

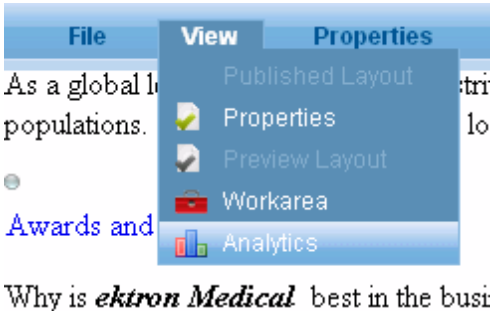
Any authorized user can view Analytics for a PageBuilder page by following these steps.

Note: You cannot drag and drop the Analytics widget onto a PageBuilder page.

1. Use the right arrow button (circled below) to open the PageBuilder menu.



2. From the menu, select View > Analytics.



3. The SEO page's Traffic tab appears.

   Alfred has logged into the CMS and is in the workarea, How does he see page analytics from the workarea? Here is how.

Viewing Page-Level Analytics from the Workarea

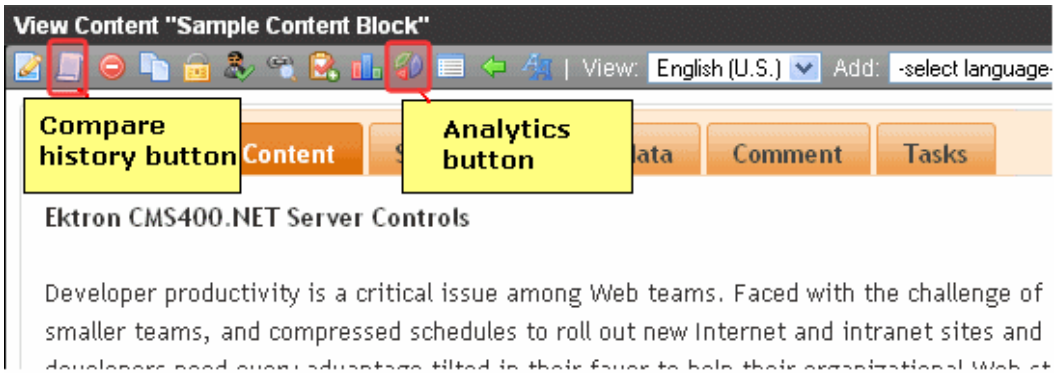
The Ektron CMS400.NET Workarea provides two page-level views of Analytics data.

- The View Content History screen - compares Analytics data for any two published versions

- The Analytics toolbar button - displays the SEO page's Traffic tab.

To view a content item's Analytics data from the Ektron CMS400.NET Workarea, follow these steps.

1. Navigate to the folder containing the content whose Analytics data you want to view.
2. Click the content item.

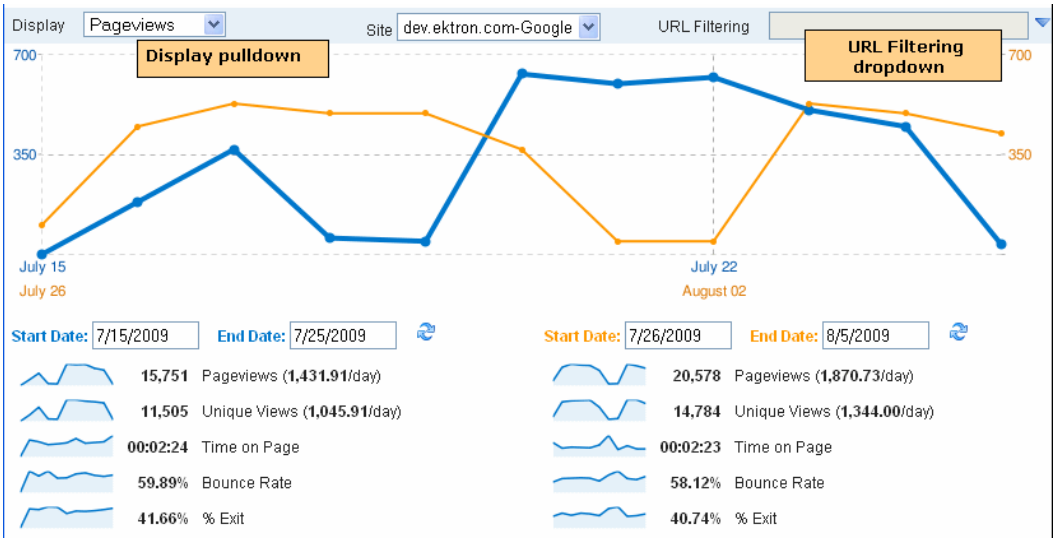

View Content "Sample Content Block"
View: English (U.S.)
Add: -select language-
Compare history button
Analytics button
Content
Comment
Tasks
Ektron CMS400.NET Server Controls
Developer productivity is a critical issue among Web teams. Faced with the challenge of smaller teams, and compressed schedules to roll out new Internet and intranet sites and

Alfred recently identified that the wrong message was being sent out with one particular piece of content and suspects the contents wording may have been causing confusion in the need for his products or services. So he decided to change the content to clear up the misconception. After a few weeks Alfred decides to see if there is any notable differences in traffic. He can now do this. He simply compares the two content versions to see if there is any difference in traffic. How does the accomplish this? Simple…

Comparing Two Published Versions of Content

On the View Content History screen, blue and orange radio buttons appear next to each published version of content, as shown below.

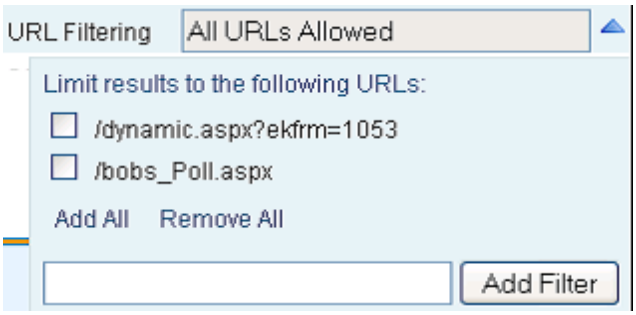
To compare Analytics data, click the appropriately-colored radio button next to each version, then click the Compare button



Alfred spent a great deal of money on a third party consultant to organize his content using URL aliasing. After paying the initial cost Alfred is suffering from buyers remorse, how does he know If his companys investment was worth the money. It would definitely help to justify the cost if he could show his CEO the improvement in hard data. He can now using the analytics:

URL Filtering

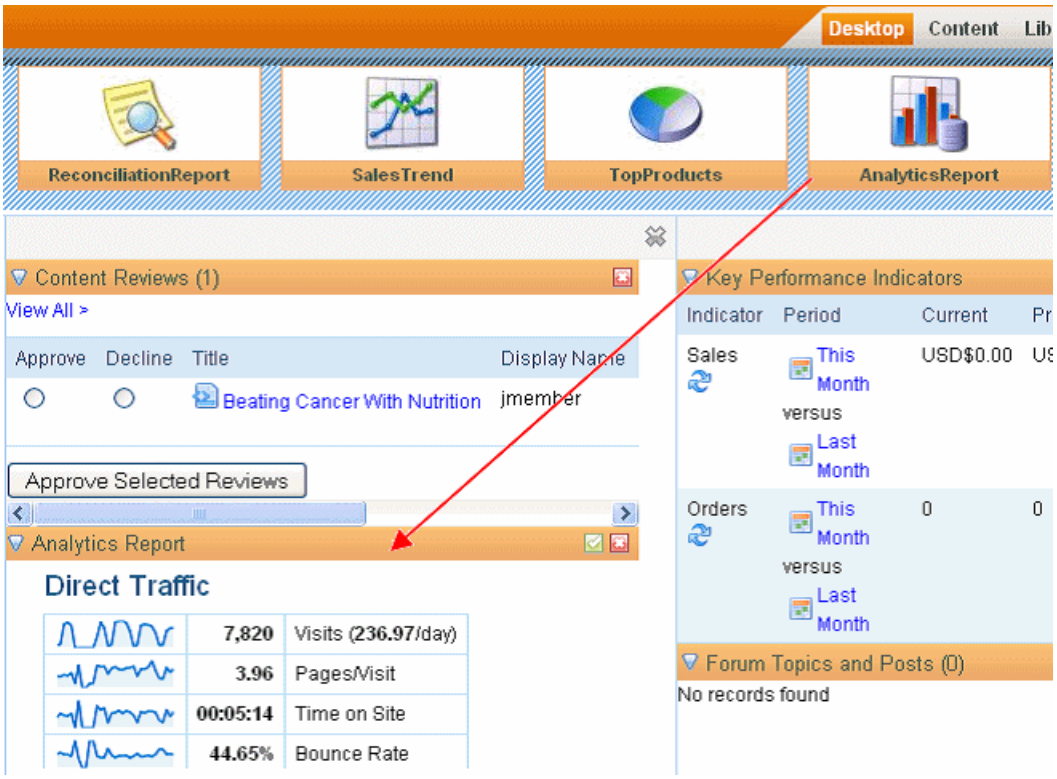
The URL Filtering tab of the Compare Analytics screen lets you break down the data by each of these identifiers. So, for example, you can drill down to view only the data collected when site visitors accessed a page by typing its manual alias into the browser.



The above information has been FANTASTIC for Alfred as he can see the data he needs at any time. But bouncing between site and drop downs and methods has gotten a little annoying. Alfred would also like to keep an eye on how things are going but he doesn't want to have to repeat the above processes every time. Alfred quickly discovers he can use the smart desktop with the reports to see the data the first time he logs into the workarea and can monitor it from there without having to bounce all over the place. Here is how he accomplishes that:

Site Level Analytics Data

You can view Analytics data for any site via the Analytics Report Widget and several reports.

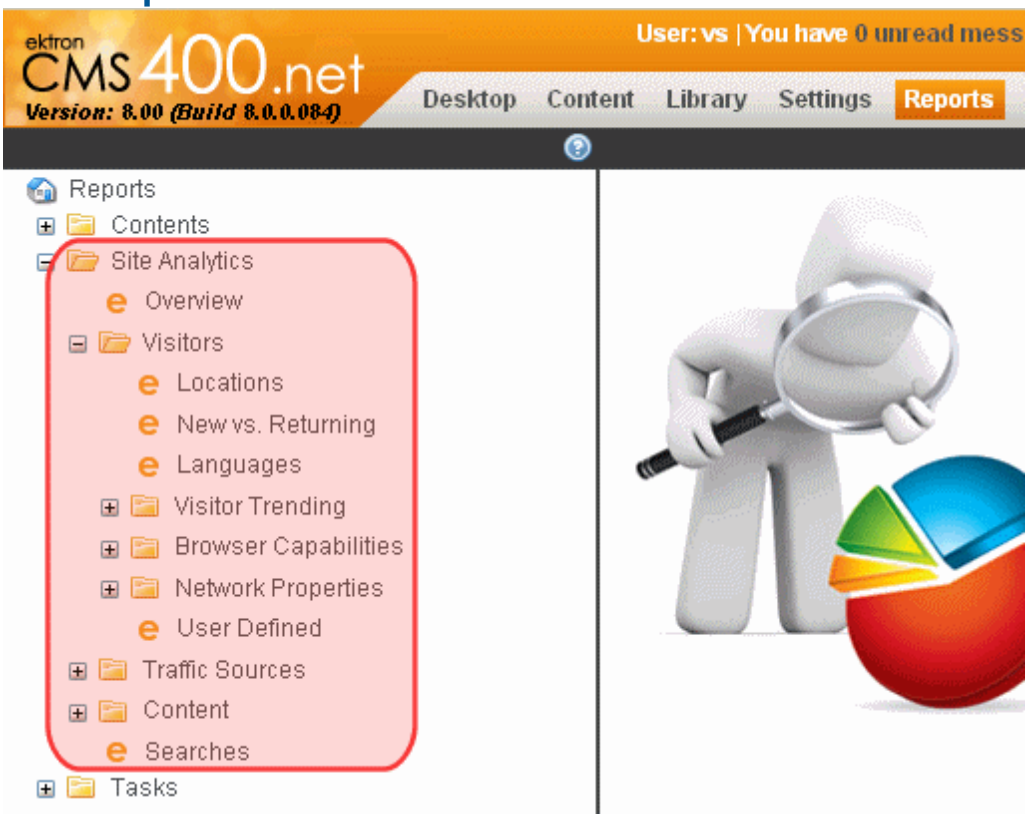


Hard Data. CEO's and COO's prefer hard data. The wish to have this information available to them at any time without having to know what the information was ahead of time and compare to right now. Alfred steps in to help by showing his CEO And COO exactly how they can get the information when they need it and how they need it.

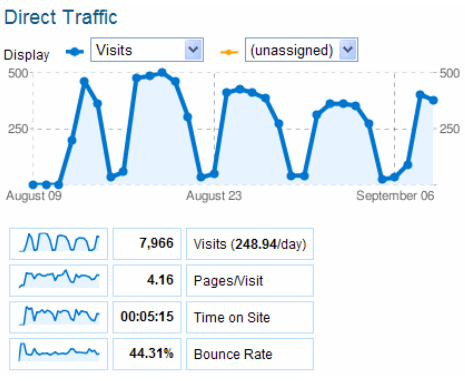
Alfred also knows that he will more then likely have to provide this information daily or quarterly as his CEO and COO cant be bothered to run reports every time they need it. Isn't that what they are paying Alfred for?

Here is how he gets at the information

Site Reports:



Available Reports



Top Content

17,821 pages were viewed a total of 102,572 times

Page	Pageviews	Unique Pageviews	Avg. Time on Page	Bounce Rate	% Exit
/	7,572	6,263	00:01:00	24.75%	23.20%
/forum.aspx	5,997	3,688	00:00:57	22.98%	10.59%
/kb_article.aspx?id=5982	4,750	4,382	00:04:42	91.60%	90.67%
/forum.aspx?g=topics&f=80	3,891	1,398	00:02:24	27.65%	12.72%
/forum.aspx?g=search	2,182	1,128	00:01:28	41.18%	18.70%
/support.aspx	2,167	1,694	00:01:27	34.63%	32.16%
/cms400releasenotes.aspx	1,269	1,090	00:03:08	80.68%	64.30%
/forum.aspx?g=topics&f=88	1,236	544	00:02:13	38.83%	13.35%

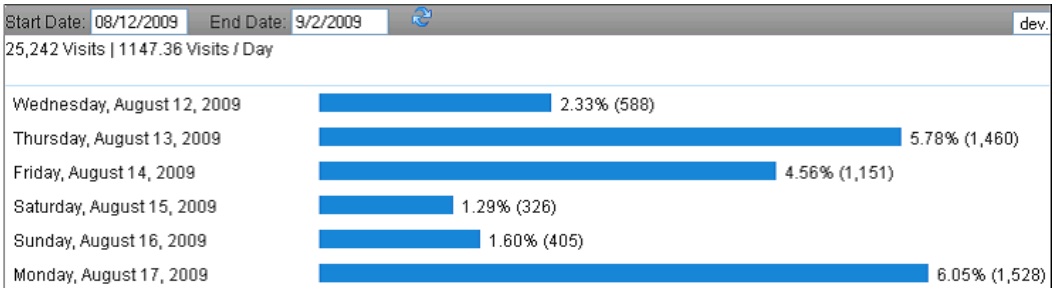
Visitors

Locations

32,639 visits came from 151 countries/territories

Country/Territory	Visits	Pages/Visit	Avg. Time on Site	% New Visits	Bounce Rate
United States	18,786	3.86	00:04:51	44.34%	50.45%
India	2,505	2.22	00:02:53	69.38%	68.78%
United Kingdom	1,960	2.88	00:03:30	59.29%	60.20%
Canada	1,810	3.43	00:04:07	54.59%	54.36%
Australia	568	2.29	00:02:12	73.59%	68.66%
Germany	347	1.35	00:00:52	91.93%	84.15%
Netherlands	329	1.72	00:01:41	83.59%	80.55%

Visitor Trending



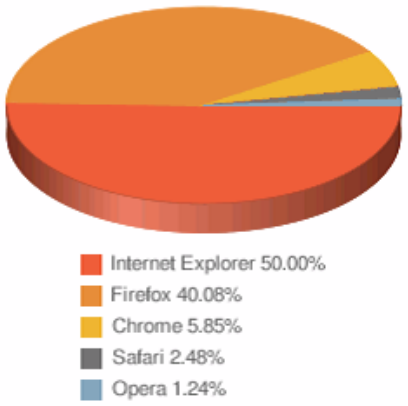
Browser Capabilities

Optimizing your site for the appropriate technical capabilities helps make your site more engaging and usable and can result in higher conversion rates and more sales.

Browsers

34,589 visits used 20 browsers

Browser	Visits	%	Contribution to total
Internet Explorer	17,294	50.00%	
Firefox	13,864	40.08%	
Chrome	2,024	5.85%	
Safari	858	2.48%	
Opera	429	1.24%	
Mozilla	68	0.20%	
Opera Mini	14	0.04%	
SeaMonkey	9	0.03%	
Mozilla Compatible Agent	7	0.02%	
Konqueror	5	0.01%	
Yandex	4	0.01%	
Galeon	2	0.01%	
Netscape	2	0.01%	



Network Properties

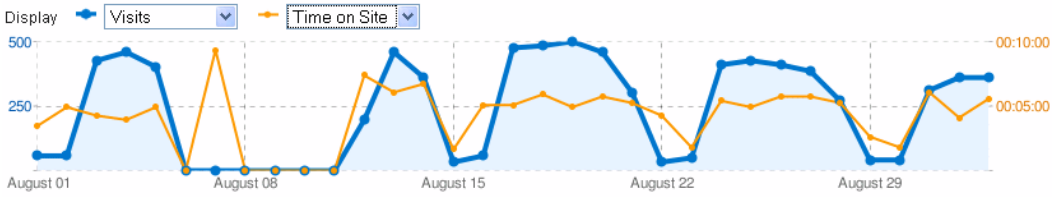
Network Location

25,242 visits came from 5,323 network locations

Network Location	Visits	Pages/Visit	Avg. Time on Site	% New Visits	Bounce Rate
sprint	1,741	4.82	00:06:20	14.65%	39.86%
road runner holdco llc	755	3.03	00:02:59	56.69%	56.29%
comcast cable communications inc.	456	2.35	00:02:45	75.66%	67.54%
ektron inc.	434	1.81	00:01:43	6.22%	75.12%
verizon internet services inc.	392	2.93	00:02:38	68.11%	62.24%
internet service provider	338	2.83	00:03:43	69.23%	73.37%
cox communications inc.	224	5.10	00:08:45	41.96%	46.43%

Traffic Sources

Direct Traffic



	7,820	Visits (236.97/day)
	3.96	Pages/Visit
	00:05:14	Time on Site
	44.65%	Bounce Rate

Content

Top Content

16,091 pages were viewed a total of 88,948 times

Page	Pageviews	Unique Pageviews	Avg. Time on Page	Bounce Rate	% Exit
/	7,300	6,031	00:01:10	26.98%	25.41%
/forum.aspx	4,729	2,887	00:00:59	22.65%	10.51%
/kb_article.aspx?id=5982	4,341	3,993	00:04:32	91.61%	90.65%
/forum.aspx?g=topics&f=80	3,137	1,107	00:02:31	29.51%	12.88%
/support.aspx	2,117	1,645	00:01:28	37.67%	34.10%
/forum.aspx?g=search	1,729	911	00:01:31	43.86%	19.26%

Appendix H - Mobile Device Support

Mobile Device Support

The new Device Configurations settings define templates for mobile devices that are automatically substituted for generic page templates used on desktop browsers. A Wireless Universal Resource File (WURFL) is used to provide information about capabilities and features of many mobile devices.

Overview

Your website may be optimized for the desktop experience and may need help translating to mobile use. Mobile applications require different, more compact navigational aids, and content must fit into a smaller footprint. Mobile websites need "click to call" options to take advantage of cellular technology, a robust search, flexible menus, and quick access to content. Tables and figures may need to be adjusted to avoid unnecessary "pinching" and scrolling.

Separating Content from Presentation

Ektron CMS400.NET separates content from presentation so that content developers can concentrate on composition. Ektron recommends developing templates designed for mobile devices that use content you have prepared for any page in the CMS. Associate these templates to your web site templates by creating mobile configuration groups. Then when the mobile device is detected, the mobile template designed for that device is used.

Determining the Device that Accesses Your Website

Ektron CMS400.NET detects the device that a person uses (such as a Smart Phone or tablet) to access your website. It also detects specific characteristics of a particular device, such as the differences between the Android Droid X and the Android Droid 2. Knowing these characteristics lets you determine how to render the user experience. For example, one device may support Flash technology and another may not.

Determining Configuration Groups with Business Analytics

To determine which mobile devices to add to your device configurations, look at your Business Analytics report in Ektron CMS400.NET Reference. From this report, you can see what mobile devices are currently browsing your site.

To see the Browser and OS report, follow these steps.

1. In the Workarea, select Reports > Traffic Analytics > Visitors > Browser Capabilities > Browsers and OS.
2. Modify the time period and rank if needed.

Mobile Device Analytics

The example below shows that two mobile device types have browsed pages: Android and iPhone. Create templates and device configurations to improve the visitor's experience.